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# **Office of the Chief Technology Officer (OCTO)**

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## **e-Gov Application Support CBE Online Internal User Manual**

**Date: 11 March 2009**



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# 1 Introduction

## 1.1 Purpose

The purpose of this document is to provide instructions for internal DC government personnel to use the CBE Online application to input information into the Certified Business Enterprise (CBE) database and to prepare on-demand compliance and certification reports.

## 1.2 Scope

This document covers only those functions accessed via the DC intranet. The document has been broken into sections by roles. The following roles have been covered:

- Administrators
- Contract Managers
- Compliance Managers
- Certification Managers
- Certification Specialists
- DSLBD View Only Users
- Agency CBE Liaisons

In addition to the application that is used by internal users, the application also has an external or Internet interface where companies can apply for initial CBE certification, recertify, or upgrade their certification as well as enter or verify payment information on contracts.

## 1.3 Audience

The audience for this document includes:

- Administrators
- Contract Managers
- Compliance Managers
- Certification Managers
- Certification Specialists
- Agency CBE Liaisons

## 1.4 Overview

This application was developed to assist the Department of Small and Local Business Development (DSLBD) to track companies as they apply for CBE certification and monitor the various awards and payments to ensure local businesses are receiving the benefits set aside for them. In addition to the application that is used by internal users (see list in Section 1.3 Audience), the application also has an external or Internet interface where companies can apply for initial CBE certification, recertify, or upgrade their certification as well as enter or verify payment information.

## 2 Common Features for All Users

### 2.1 General Rules for Usage



Do **NOT** use the Browser's back button; use the Go Back button within the application to return to the previous page.



All new internal users will be required to change their passwords at the first login. Any user that has a password reset will also receive a temporary password and will be required to change the password at the first login. Users will be automatically directed to the Change Password screen.



Fields with an asterisk \* are required fields.



Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A).

### 2.2 Login

All users must log in to the application by entering a username and password. If a user cannot remember his username or password, he can obtain the information by selecting the Forgot Your Password or Username link.

#### CBE Business Online Online Business Processing

[CBE Online Users Manual \(PDF\)\\*](#)

In order to certify as an CBE, please note that DC Law 16-33 Section 2331 states that your **principal office must be physically located within the District of Columbia and your highest level managerial staff must be operating from this location**. In addition, one of the following must be true: greater than 50% of the assets or revenues of the business are derived from within the District, or greater than 50% of employees or owners are residents of the District.

To begin the online process, you will need to select the **Register** button below to create a username and password.

[Register](#)

If you are a returning applicant enter your username and password below and select **Submit**.

Username:

Password:

[Submit](#)

[Forgot Your Password or Username / Change Your Password](#)

[Return to CBE Business Center](#)

\* This document is presented in Portable Document Format (PDF) and a PDF reader is required for viewing.  
[Download a PDF reader](#) or [learn more](#) about PDFs.

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Citywide Call Center : (202) 727-1000  
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John A. Wilson Building  
1350 Pennsylvania Avenue, NW  
Washington, DC 20004

Figure 1: Login Screen

## 2.3 Forgot Your Password or Username

Selecting the Forgot Your Password or Username link displays the following screen.

**CBE Business Online**  
**Forgot Password**

If you have forgotten your current username or password, please type in your name and email address, and select **Submit**. You will receive an email with your username and a temporary password. You must change the temporary password the next time you access CBE Business Center.

User Name:\*

Email:\*

\*Indicates required fields

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Figure 2: Forgot Password Screen

Enter your first name, last name, and email and then select "Submit." You will receive an email with your username and a temporary password.

## 2.4 Change Your Password

Selecting the Change Your Password link displays the following screen.

**CBE Business Online**  
**Change Password**

[? Help](#)

If you wish to change your password, fill in the fields below and select **Submit**. If you forgot your password and received a temporary password in your email, enter it into the "Current/Temporary Password" field, type in a new password underneath and select **Submit**.

- [Forgot Your Password or Username](#)

Fields marked with an asterisk (\*) are required.

Username:\*

Current/Temporary Password:\*

New Password:\*  (Enter 5 to 25 characters, case-sensitive)

Confirm Password:\*

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Figure 3: Change Your Password Screen

You may change your password at any time before or after login. If you received a temporary password via email, you will be directed here after login. Enter your username, your current or temporary password, enter a new password, enter the same new password in the Confirm Password field, and select "Submit." You will be directed to your Administration page when the action completes. Select "Cancel" to return to the previous page without taking any action.

## 2.5 Administration Screen

Successful login will take you to an Administration screen that is specific to your assigned role within the system. An example is below.

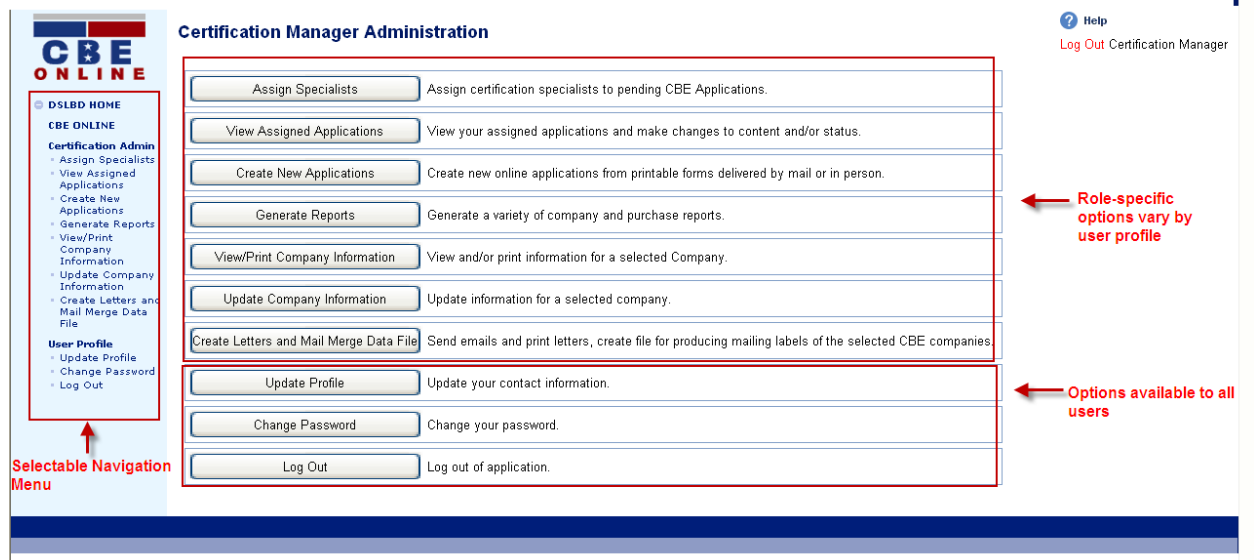


Figure 4: Example of an Administration Screen

Some areas to point out are the role in the title of the screen. The buttons and the left navigation menu have the same functionality. All users will see the "Update Profile," "Change Password" and "Log Out" buttons. Other buttons on the screen will vary depending on a user's assigned role.

## 2.6 Update Profile

After successful login, all users can update their own profile.

**User Profile**  
**Update Profile**

Update your contact information below and select Update Profile.  
**Public Contact Information**  
*Note: Information below will be displayed on the public website.*

First Name:\* Certification  
Last Name:\* Manager  
Phone: 202, 999, 9999 Ext.:  
Email:\* test@dc.gov  
Username:\* egovrole3

\*Indicates required fields

Figure 5: Update Profile Screen

This screen allows you to change any field in your user profile by simply selecting the field and entering new information into it. Required fields have an asterisk. Select “Update Profile” to save the changes. Select “Cancel” to take no action and in to the Administration screen.

## 2.7 Log Out

Selecting the “Log Out” button logs out the user and returns to the Login screen (see Figure 1).

## 3 Administrator Role

### 3.1 Administration Screen

The Administrator's Administration screen is displayed. Select one of the options listed.

**Welcome Administration**

Allows you to search and update user within the system.  
 Adds new users into the system.  
 Update your contact information.  
 Change your password.  
 Log out of application.

Figure 6: Administrator's Administration Screen

### 3.2 View/Update User

Selecting the “View/Update User” button displays the following screen.

**User Admin**  
View/Update Users

DSLB HOME  
CBE ONLINE  
Users Admin  
- View/Update User  
- Add New User  
User Profile  
- Update Profile  
- Change Password  
- Log Out

Last Name:  User Role:  Email:   
 First Name:  Agency:  Username:   
☐ Active Users Only 2 Company:  FEIN:  Search

**Add User**  
Showing: 1 - 10 of 5457 1 → Page 1 of 546 1 2 3 4 5 6 7 8 9 10 [11+]

<input type="checkbox"/>	Last/First Name	Username	Agency	Email Address	Status	Role	<input type="checkbox"/>
<input type="checkbox"/>	Admin, LSDBE	egovadmin		test@dc.gov	Active	Administrator	<input type="checkbox"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">4</span>
<input type="checkbox"/>	Manager, Contract	egovRole2		test@dc.gov	Active	Contract Manager	<input type="checkbox"/>
<input type="checkbox"/>	Manager, Certification	egovrole3		test@dc.gov	Active	Certification Manager	<input type="checkbox"/>
<input type="checkbox"/>	Manager, Compliance	egovRole4		test@dc.gov	Active	Compliance Manager	<input type="checkbox"/>
<input type="checkbox"/>	Cert, Specialist	egovrole5		test@dc.gov	Active	Certification Specialist	<input type="checkbox"/>
<input type="checkbox"/>	Agency, Liaison	egovrole6	OCTO	test@dc.gov	Active	Agency Liaison	<input type="checkbox"/>
<input type="checkbox"/>	Branson, Peter T.	bransonp		test@dc.gov	Inactive	Company	<input type="checkbox"/>
<input type="checkbox"/>	Jones, Fritz	jonesf		test@dc.gov	Active	Company	<input type="checkbox"/>
<input type="checkbox"/>	Braswell, Phillip P.	braswellp		test@dc.gov	Active	Company	<input type="checkbox"/>
<input type="checkbox"/>	Wilson, Lillian Johnson	wilsonl		test@dc.gov	Active	Company	<input type="checkbox"/>

3 Reset Password Submit

Figure 7: View/Update Users Screen

1. The default view displays all users in the system and consists of many pages. You should enter some search criteria in order to narrow down the list.
2. Enter information into any or all of the fields as desired. If you enter multiple fields, the system will display only those results that match all entered criteria.

Check the **Search Active Users Only** box to limit the search to only active users; unchecking the box will search both active and inactive users. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter the last name of a user in the **Last Name** field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter the first name of a user in the **First Name** field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Select a specific **User Role** from the drop-down list. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Select a specific **Agency** from the drop-down list. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.



Enter a user's email address in the **Email** field. If this is the only criteria you want to see, select the "Search" button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the "Search" button.


Enter a username in the **Username** field. If this is the only criteria you want to see, select the "Search" button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the "Search" button.

All users that meet your search criteria will be displayed in the results table. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A).

3. You can use the check boxes in the results table to perform certain functions on several users on the same page

To reset a user's password, you can check the box directly in front of the Last/First Name column, scroll to the bottom of the table, ensure the field at the bottom reads "Reset Password," and then select "Submit." All users that you checked will have their passwords reset and will receive an email with a temporary password.

You can also set a user to Active or Inactive with the same technique and selecting the appropriate option from the list. You can perform these functions from the individual's profile via the Update icon.

4. To look at an individual's profile select the Update icon  in the row for an individual user. This opens the Update User screen (see Figure 8).

### 3.2.1 Update User

**User Admin**  
View/Update Users

? Help  
Log Out

1 Last Name:

First Name:

☐ Active Users Only

2 User Role:

Agency:

Company:











Email:

Username:

FEIN:

**Add User**

Showing: 1 - 10 of 5457 Page 1 of 546 1 2 3 4 5 6 7 8 9 10 [11]

<input type="checkbox"/>	Last/First Name	Username	Agency	Email Address	Status	Role	
<input type="checkbox"/>	Admin, LSDBE	egovadmin		test@dc.gov	Active	Administrator	
<input type="checkbox"/>	Manager, Contract	egovrole2		test@dc.gov	Active	Contract Manager	
<input type="checkbox"/>	Manager, Certification	egovrole3		test@dc.gov	Active	Certification Manager	
<input type="checkbox"/>	Manager, Compliance	egovrole4		test@dc.gov	Active	Compliance Manager	
<input type="checkbox"/>	Cert, Specialist	egovrole5		test@dc.gov	Active	Certification Specialist	
<input type="checkbox"/>	Agency, Liaison	egovrole6	OCTO	test@dc.gov	Active	Agency Liaison	
<input type="checkbox"/>	Branson, Peter T.	bransonp		test@dc.gov	Inactive	Company	
<input type="checkbox"/>	Jones, Fritz	jonesf		test@dc.gov	Active	Company	
<input type="checkbox"/>	Braswell, Phillip P.	braswellp		test@dc.gov	Active	Company	
<input type="checkbox"/>	Wilson, Lillian Johnson	wilsonl		test@dc.gov	Active	Company	

3

Figure 8: Update User Screen

This screen contains the selected user's profile.

1. You can edit any of the fields on the screen by simply entering new information into any of the fields. Required fields are identified with an asterisk.
2. Select a "User Role." Note that the Agency drop-down list is only available if the Agency Liaison role is selected.
3. You can also make the user Active or In-Active by selecting the option from the dropdown box.

Select "Submit" when you have made all the changes you desire and select "OK" on the popup box. Selecting "Cancel" will return you to the previous screen without performing any action.

### 3.3 Add New User

Selecting the "Add New User" button displays the following screen.

The screenshot shows a web form titled "User Admin" with a subtitle "Add New User". In the top right corner, there are links for "Help" and "Log Out". The form fields are as follows:

- First Name:\* (text input, circled 1)
- Last Name:\* (text input)
- Username:\* (text input)
- Email:\* (text input)
- Phone: (text input with a dropdown for area code)
- Extension: (text input)
- User Role:\* (dropdown menu, circled 2)
- Is Active:\* (radio buttons for True and False, circled 3)
- Save and Cancel buttons (circled 4)

Figure 9: Add New User Screen

1. Enter new user information into all of the fields. Required fields are identified with an asterisk. The system will generate the username as the last name and first initial; if this is correct, you can leave it there, otherwise you can enter a new username. Each username must be unique and only one username per role is allowed.
2. Select a "User Role." Note that the Agency drop-down list will appear if the Agency Liaison role is selected. Select an agency for an Agency Liaison.
3. You can also make the user Active by selecting the "True" radio button or Inactive by selecting the "False" radio button. Active is the default setting.
4. Select "Save" when you have made all the changes you desire. Selecting "Cancel" will return you to the previous screen without performing any action. The system will automatically send an email to the user with their username and a temporary password.

## 4 Contract Manager

### 4.1 Contract Manager Administration screen

The Contract Manager Administration screen displays. Select one of the options listed.

**Contract Manager Administration**

- Add New CBE Plan** Add a new CBE subcontracting plan.
- Update CBE Plan** Update, correct, or delete an existing CBE subcontracting plan.
- View Subcontractor Payments** View payments to CBE subcontractors (verified, unverified and/or disputed).
- Generate Payments Report** Generate and print a report of contractor payments to subcontractors.
- Create Mail Merge Data File** Create file for producing mailing labels of the selected CBE companies.
- Update Profile** Update your contact information.
- Change Password** Change your password.
- Log Out** Log out of application.

Figure 10: Contract Manager Administration Screen

### 4.2 Add New CBE Plan

Selecting the Add New CBE Plan button returns the following screen.

**CBE Plan Administration**  
**Add New CBE Plan**

Enter a contract number below and select Continue.

1 → Contract number.\*  xxxxx-9999-x-9999

Fields marked with an asterisk(\*) are required.

<< Go Back **Continue >>** 2

Figure 11: Add New CBE Plan - Locate a Contract

1. Enter a valid contract number in the field.
2. Select "Continue."

The screen will refresh and display all contracts with the entered number. Note that some contracts may contain a contract modification number, a task order number, or a task order modification number.

Contract number.\* 7717-2005-D-8687

Select the task order or mod that represents the contract for the new LSDBE plan

	Task Order Number	Task Order Modification Number	Contract Modification Number	Award Amount
<input type="radio"/>				1,002,000.00
<input type="radio"/>	5884			1,003,000.00
<input type="radio"/>			508	1,010,000.00

Fields marked with an asterisk(\*) are required.

<< Go Back Continue >>

Figure 12: Add New CBE Plan—Select a Contract

If multiple contracts are returned:

1. Select the desired one to enter a new CBE Plan (see figure below).
2. Select “Continue” to move to the next step.

If you select a contract that already has a plan associated with it and try to continue, the following error-message screen displays.

**Error:**  
The following field(s) are incomplete or incorrect.

- This contract number has already been used in a LSDBE plan. Click [here](#) to edit.

Contract number.\* 7717-2005-D-8687

Select the task order or mod that represents the contract for the new LSDBE plan

	Task Order Number	Task Order Modification Number	Contract Modification Number	Award Amount
<input type="radio"/>				1,002,000.00
<input type="radio"/>	5884			1,003,000.00
<input type="radio"/>			508	1,010,000.00

Fields marked with an asterisk(\*) are required.

<< Go Back Continue >>

Figure 13: Add New CBE Plan—Error Message

1. If you need to edit the existing plan, select the “here” link to go to the Update Plan screen.
2. You may also choose a different contract
3. Select “Continue.”

The screen refreshes and displays the following screen where CBE dollars are added to the plan. Notice that the contract and any mod or task order numbers associated with it are displayed in the read-only contract information section.

Enter the dollar amount that has been allocated to LSDBEs for this contract and select Continue.

**Contract Summary Information (7717-2005-D-8687, MOD: 508)**

Awarded To: Test-Company-forUserD-212  
FEIN: 604712558  
Address:

Caption: Gen-Contract for company: Test-Company-forUserD-212. Contract Modification Num added.  
Contract Amount: \$1,010,000.00  
Date of Award: 3/16/2005  
Using Agency: OCTO

Contract Total Dollars for LSDBE's \$  Percentage of Total Contract Amount Allocated for LSDBEs  %

Fields marked with an asterisk(\*) are required.

<< Go Back Continue >> Add LSDBE Plan >>

Figure 14: Add New CBE Plan—Enter Contract Dollars for CBEs

1. Enter the dollar amount that is set aside for the CBE subcontracting plan. Notice that the percentage of the total contract amount is automatically calculated for you.
2. Select “Continue” to move on to the next step.

The following screen is where CBE subcontractors are added to the plan.

Enter the FEIN of the subcontractor that you would like to add and select Find.

**Contract Summary Information (7717-2005-D-8687, MOD: 508)**

Awarded To: Test-Company-forUserD-212  
FEIN: 604712558  
Contract Amount: \$1,010,000.00

Contract Total Dollars for LSDBE's \$  Percentage of Total Contract Amount Allocated for LSDBEs  %

Enter LSDBE Subcontractor's Federal Employer ID (FEIN) \*  Find

Fields marked with an asterisk(\*) are required.

<< Go Back to Beginning Save LSDBE Plan

Figure 15: Add New CBE Plan—Add CBE Subcontractors to the Plan

Any adjustment to the contract dollar value can be made in the Contract Total Dollars for CBEs field.

1. Enter the entire Federal Employee Identification Number (FEIN) of the CBE subcontractor identified on the plan. Select the “Find” key to display the subcontractor's company information.

Select Add to place this subcontractor on this plan.

**Contract Summary Information (7717-2005-D-8687, MOD: 508)**  
Awarded To: Test-Company-forUserD-212 FEIN: 604712558 Contract Amount: \$1,010,000.00

Contract Total Dollars for LSDBE's \*\$ 360000 Percentage of Total Contract Amount Allocated for LSDBEs 35.64 %

Enter LSDBE Subcontractor's Federal Employer ID (FEIN) \* 929353091 Find

**LSDBE Subcontractor Information**

Company Name:	Test-Company-forUserD-195	Contact Person:	Jav-Generated SysUserD-195
Business Address:		Contact Phone:	
LSDBE Certification No:	935	Contact Email:	j.j@dc.gov

Add

Fields marked with an asterisk(\*) are required.

<< Go Back to Beginning Save LSDBE Plan

Figure 16: Add New CBE Plan—Add CBE Subcontractors to the Plan

2. Verify that this is correct and select the “Add” button. This places the subcontractor into the plan (see figure below).

Enter the dollar amount that will be paid to the LSDBE and a brief description of the required work. You must continue to add LSDBE subcontractors or plan dollars until the percentage equals 100. Once the plan is complete, select Save LSDBE Plan.

**Contract Summary Information (7717-2005-D-8687, MOD: 508)**  
Awarded To: Test-Company-forUserD-212 FEIN: 604712558 Contract Amount: \$1,010,000.00

Contract Total Dollars for LSDBE's \*\$ 360000 Percentage of Total Contract Amount Allocated for LSDBEs 35.64 %

Enter LSDBE Subcontractor's Federal Employer ID (FEIN) \* Find

LSDBE FEIN	LSDBE Subcontract Name	Award Date	Plan Dollars	%	LSDBE Work Description	
929353091	Test-Company-forUserD-195	01/25/2006 mm dd yyyy	230000	63.889	Work description	X
526412050	Test-Company-forUserD-193	01/25/2006 mm dd yyyy	130000	36.111		X
Total:			360,000.00	100		

Fields marked with an asterisk(\*) are required.

<< Go Back to Beginning Save LSDBE Plan

Figure 17: Add New CBE Plan—Add CBE Subcontractors to the Plan

1. Add the dollar value and a description of the work the subcontractor will be doing.
2. To add another contractor to the plan enter another FEIN into the field and select “Find.” Continue to add CBEs to the plan until the total dollars equals the set-aside dollars and the total percentage is 100. The “Save CBE Plan” button will then be available.
3. Select “Save CBE Plan” to input the CBE Plan and associate it with the specific contract. You are now finished with the subcontractor plan for the selected contract.

### 4.3 Update CBE Plan

Selecting “Update CBE Plan” from the Administration screen displays the following screen.

**CBE Plan Administration**  
Update CBE Plan

? Help  
Log Out Contract Manager

Enter criteria below to search through the current contracts that have CBE subcontracting payment activity. Select the **View** icon to view the associated payment information. Select any column to sort the table by that column's value. Press the **Print** button to print out a list of all contracts.

Contract No.:  Prime FEIN:  Prime Contractor:

**Awarded Date**  
From:  To:

Agency:

**Number of Contracts:** 8  
**Total Amount:** \$17,025,101.30

Contract No.	Prime Contractor	Caption	Amount	Award Date	End Date	Agency		
POAM-2006-C-0001	Capitol Technology Services, Inc.	Refurbish Elevators at the Reeves Center	\$1,786,455.00	05/31/2006	05/30/2007	OPM	✖	🔍
DCAM-2006-B-0027	Urban Service Systems Corporation	Trash and Recyclable Materials Collections	\$316,421.20	04/06/2006	04/05/2007	OPM	✖	🔍
POAM-2006-C-0002	Keystone Plus Construction Corporation	Refurbish Elevators at the Municipal Center	\$2,988,000.00	06/21/2006	06/20/2007	OPM	✖	🔍
POAM-2005-C-0027	Keystone Plus Construction Corporation	Renovation of the J.B. Johnson Nursing Center	\$4,300,000.00	02/01/2006	12/01/2006	OPM	✖	🔍
POAM-2005-C-0022	Keystone Plus Construction Corporation	Renovate the CCNV City Shelter	\$6,150,000.00	03/30/2006	05/31/2007	OPM	✖	🔍
POAM-2002-D-0019 MOD: M002	Rodgers Brothers Custodial Services, Inc.	Construct a Technology Command Center	\$147,007.10	05/03/2006	08/07/2006	OCTO	✖	🔍
POAM-2002-B-0019 TaskOrder: 10	Rodgers Brothers Custodial Services, Inc.	Interior space build-out of existing space at Tenley library	\$458,468.00	08/23/2006	11/19/2006	DCPL	✖	🔍
POCE-2006-C-0075	Garcete Construction Company, Inc.	Exterior Renovations including selective specialty restorations at Mt. Pleasant Library	\$878,750.00	07/20/2006	05/19/2007	DCPL	✖	🔍

Figure 18: Update CBE Plan—Search Screen

1. Enter information into any or all of the fields as desired. If you enter multiple fields, the system will display only those results that match all entered criteria.

Enter **Contract Number** search criteria by entering the whole contract number into the field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **Prime Contractor** search criteria by FEIN or Company Name. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **Award Date** search criteria in mm/dd/yyyy format. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **End Date** search criteria in mm/dd/yyyy format. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **Agency** search criteria by selecting an agency from the drop-down list. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

2. Select the “Search” button to refresh the screen. All active subcontractor payments that meet all search criteria entered will be displayed in the results table.



Contract No.: 7717-2005-D-8687 Prime FEIN: Prime Contractor:

Award Date: mm dd yyyy End Date: mm dd yyyy

Agency: All Search

Contract No.	Prime Contractor	Caption	Amount	Award Date	End Date	Agency		
7717-2005-D-8687	Test-Company-forUserD-212	Gen-Contract for company: Test-Company-forUserD-212.	\$1,002,000.00	03/16/2005	01/10/2006	OCTO	X	
7717-2005-D-8687 TaskOrder: 5084	Test-Company-forUserD-212	Gen-Contract for company: Test-Company-forUserD-212. Task Order Num added.	\$1,003,000.00	03/16/2005	01/10/2006	OCTO		
7717-2005-D-8687 MOD: 508	Test-Company-forUserD-212	Gen-Contract for company: Test-Company-forUserD-212. Contract Modification Num added.	\$1,010,000.00	03/16/2005	01/10/2006	OCTO	X	

<< Go Back

Figure 19: Update CBE Plan—Search Results

Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z), selecting it a second time will sort in a descending order (Z to A).

1. If you searched by Contract No., the results will display all contracts with any task order number, modification (MOD) number, or task order MOD number associated with the contract.
2. To view the details for a particular payment, select the View icon at the end of the row. This will take you to the detailed screen for that payment.
3. To delete a subcontracting plan that has no payments associated with it, select the Delete icon at the end of the row.

Contract Summary Information (7717-2005-D-8687, MOD: 508)

Awarded To: Test-Company-forUserD-212 FEIN: 604712558 Contract Amount: \$1,010,000.00

Contract Total Dollars for LSDBE's \* \$60000 Percentage of Total Contract Amount Allocated for LSDBEs 35.64 %

Enter LSDBE Subcontractor's Federal Employer ID (FEIN) \* Find

LSDBE FEIN	LSDBE Subcontract Name	Award Date	Plan Dollars	%	LSDBE Work Description	
929353091	Test-Company-forUserD-195	01/25/2006	230000	63.89	Work description	X
526412050	Test-Company-forUserD-193	01/25/2006	130000	36.11	Work description	X
Total:			360000	100		

Fields marked with an asterisk(\*) are required.

<< Go Back to Beginning Save LSDBE Plan

Figure 20: Update CBE Plan—Edit Fields

You may edit any of the following fields:

1. Contract Dollars
2. Enter a new subcontractor via FEIN
3. Delete a subcontractor



4. Change the Plan Dollars, Award Date or Work Description for a CBE (Changes to the Plan Dollars and subcontractor information must always ensure that 100 percent of the Contract Dollars is accounted for.)
5. Select Save to CBE Plan when you have completed your edits. Select “Go Back to the Beginning” to exit this screen without making any changes.

#### 4.4 View Subcontractor Payments

Selecting “View Subcontractor Payments” displays the following screen.

Subcontract Name:  FEIN:  Contract No.:

Payments Made From:  To:

Include Payments: ☒ Approved ☒ Disputed ☒ Unverified

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Subcontract Name	Contract Number	Services/Goods Provided	Issue Date	Payment Amount	Payment Status	Payment Comment
Test-Company-forUserD-221	1907-2003-D-1999 TaskOrder: 3875		01/17/2006	\$222.00	Unverified	
Javier's Company II	1907-2003-D-1999 TaskOrder: 3875		01/17/2006	\$333.00	Unverified	
Test-Company-forUserD-184	1907-2003-D-1999 TaskOrder: 3875		01/17/2006	\$444.00	Unverified	
Test-Company-forUserD-190	1907-2003-D-1999 TaskOrder: 3875		01/17/2006	\$333.00	Unverified	
Test-Company-forUserD-190	1907-2003-D-1999 TaskOrder: 3875		01/17/2006	\$1,111.00	Unverified	
Javier's Company II	1907-2003-D-1999 TaskOrder: 3875	2222	01/18/2006	\$2,222.00	Unverified	
Test-Company-forUserD-177	1907-2003-D-1999 TaskOrder: 3875		01/20/2006	\$100.00	Unverified	
Test-Company-forUserD-221	1907-2003-D-1999 TaskOrder: 3875	555	01/21/2006	\$555.00	Unverified	
Test-Company-forUserD-191	1907-2003-D-1999 TaskOrder: 3875	666	01/21/2006	\$666.00	Unverified	
Javier's Company II	1907-2003-D-1999 TaskOrder: 3875	3333	01/21/2006	\$3,333.00	Unverified	

<< Go Back

Figure 21: View Subcontractor Payments

1. The default view displays all subcontractor payments in the database. This will be many pages of material.
2. To narrow down the number of items displayed, enter search criteria in the top box and select the “Search” button. You can fine-tune what is displayed by selecting any combination of payments to include (checked boxes) or exclude (unchecked boxes).

#### 4.5 Generate Payments Reports

Selecting “Generate Payments Reports” displays the following screen.

Enter report criteria below and select **Generate Report**.

**Payments**

☒ Approved  
☒ Disputed  
☒ Unverified

**Prime Contractor**

Company Name:  Find FEIN:

**LSDBE Subcontractor**

Company Name:  Find FEIN:

**Date Range**

From:     To:

**Generate Report**

<< Go Back

Figure 22: Generate Payment Reports

3. Enter criteria to customize the output of your Payments Report. Enter as much or as little information in the fields as you desire.

Enter **Payments** criteria by checking the payment types you want to include in your report and unchecking those to exclude from your report. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

Enter **Prime Contractor** criteria by entering either the Company Name or FEIN into the fields. If you enter two or more letters into the Company Name field, select the “Find” button to see a list of companies that have those letters in the name and select the desired one. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

Enter **CBE Subcontractor** criteria by entering either the Company Name or FEIN into the fields. If you enter two or more letters into the Company Name field, select the “Find” button to see a list of companies that have those letters in the name and select the desired one. If you enter two or more letters into the name field, select the “Find” button to see a list of companies that have those letters in the name. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

Enter **Date Range** criteria by entering a From and To dates in mm/dd/yyyy format. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

4. Selecting “**Generate Report**” after entering some criteria will allow the system to gather all results that meet the criteria you entered. The results are displayed on a new screen.

For the following example, Javier's Company II and the dates of 7/1/2005 to 12/31/2005 were input into the filter fields and “Generate Report” was selected.

<b>Payments Report</b> <b>For Javier's Company II</b> <b>From 07/01/2005 to 12/31/2005</b>						
This report contains all approved, disputed, and unverified payments for the date range indicated above.						
Select any column header to sort the table by that column's values.						
Issue Date	Prime Contractor	Payment Status	Payment Amount	Contract No.	Payment Comment	Services/Goods Provided
08/16/2005	Test-Company-forUserD-210	Approved	\$168,673.47	393942231		Nothing, this is a code generated data.
08/16/2005	Test-Company-forUserD-210	Approved	\$71,159.12	393942231		Nothing, this is a code generated data.
08/19/2005	Test-Company-forUserD-204	Approved	\$223,797.38	509780878		Nothing, this is a code generated data.
08/21/2005	Test-Company-forUserD-210	Approved	\$126,505.10	393942231		Nothing, this is a code generated data.
08/21/2005	Test-Company-forUserD-210	Approved	\$126,505.10	393942231		Nothing, this is a code generated data.
08/26/2005	Test-Company-forUserD-210	Disputed	\$168,673.47	393942231		Nothing, this is a code generated data.
08/29/2005	Test-Company-forUserD-204	Approved	\$298,396.50	509780878		Nothing, this is a code generated data.
08/29/2005	Test-Company-forUserD-204	Approved	\$167,848.03	509780878		Nothing, this is a code generated data.
08/31/2005	Test-Company-forUserD-210	Approved	\$94,878.83	393942231		Nothing, this is a code generated data.
09/03/2005	Test-Company-forUserD-204	Disputed	\$503,544.10	509780878		Nothing, this is a code generated data.
10/14/2005	Test-Company-forUserD-212	Approved	\$392,448.98	754381087		Nothing, this is a code generated data.
10/29/2005	Test-Company-forUserD-212	Disputed	\$294,336.73	754381087		Nothing, this is a code generated data.
11/03/2005	Test-Company-forUserD-212	Approved	\$220,752.55	754381087		Nothing, this is a code generated data.
11/03/2005	Test-Company-forUserD-212	Disputed	\$662,257.65	754381087		Nothing, this is a code generated data.
11/03/2005	Test-Company-forUserD-212	Approved	\$392,448.98	754381087		Nothing, this is a code generated data.
11/03/2005	Test-Company-forUserD-212	Approved	\$294,336.73	754381087		Nothing, this is a code generated data.

Print This Report

Return to Previous Page

Figure 23: Print Payments Report—Print Screen

Select “Print This Report” to pop-up a print dialog window. For your ease of reading, you may wish to set your printer preferences or options to print this report in a landscape view. You should already have a printer set as your default printer in order to do this. The following figure depicts one type of printer window that you may see. The actual window you see depends on your network configuration, printer, and what versions of software are running on your computer and printer. Select the “Print” button to send the report to the printer.

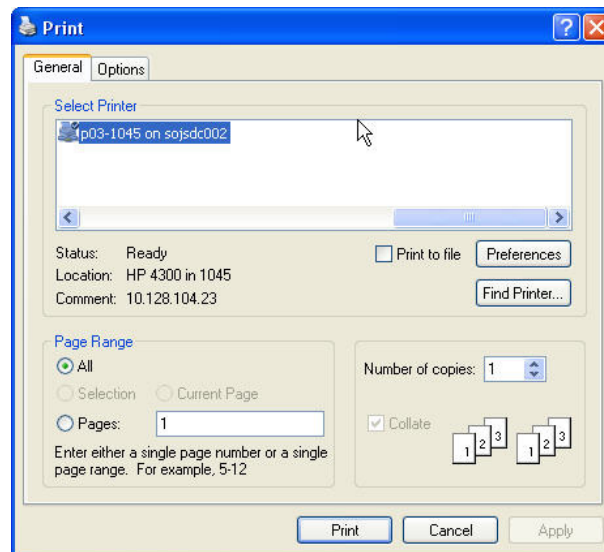


Figure 24: Print Pop-up Window

## 4.6 Create Mail Merge Data File

Selecting Create Mail Merge Data File will display the following screen:

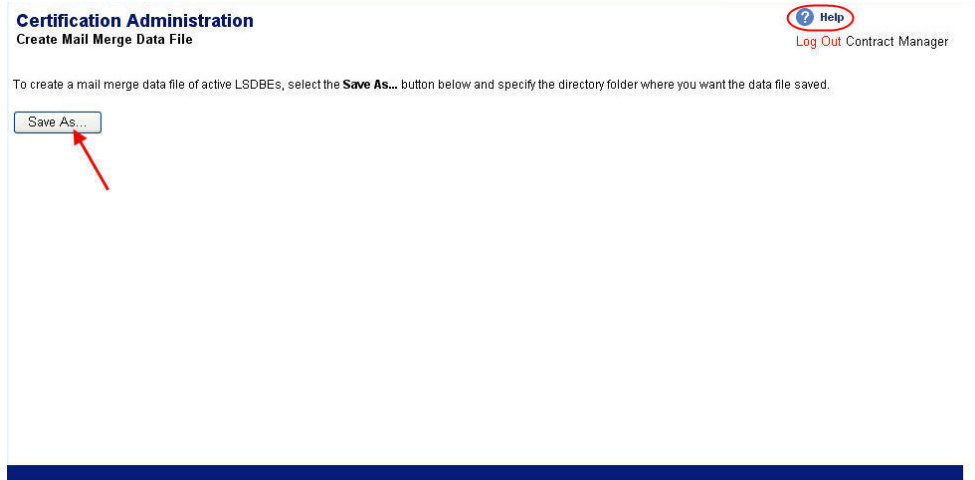


Figure 25: Create Mail Merge Data File Screen

The entire process has been explained in detail, including using Microsoft Word to generate labels and letters, in the Mail Merge User Guide (accessible from the Help link on the screen above). You should refer to this manual for all the details on using the Mail Merge feature.

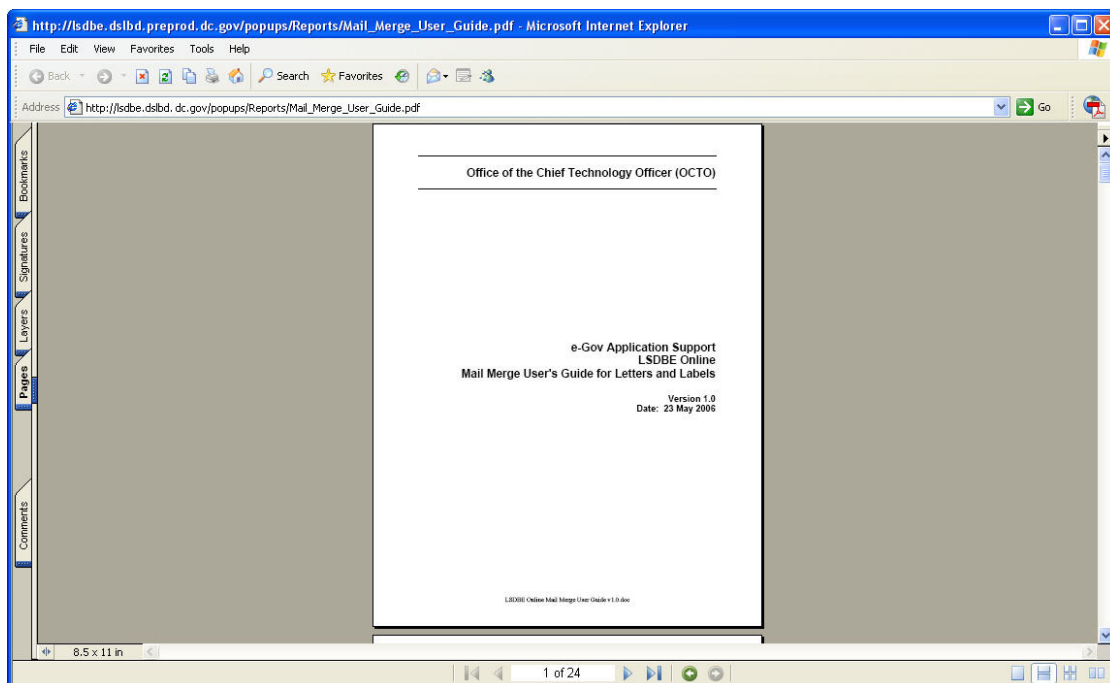


Figure 26: Mail Merge User's Guide

This section will only explain how to create the mail merge data file that will be used in Microsoft Word.

Select the "Save As..." button and the File Download popup appears.

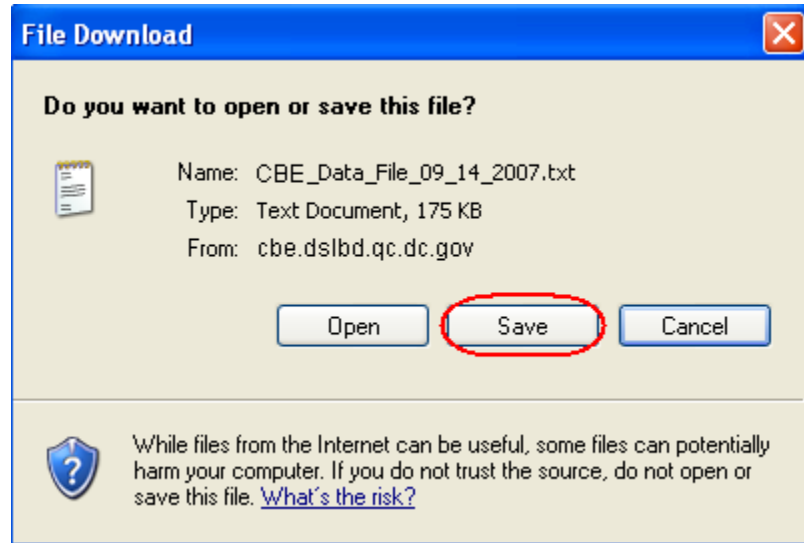


Figure 27: File Download Popup

Select "Save" to bring up the following screen where you will need to specify where to place the mail merge file.

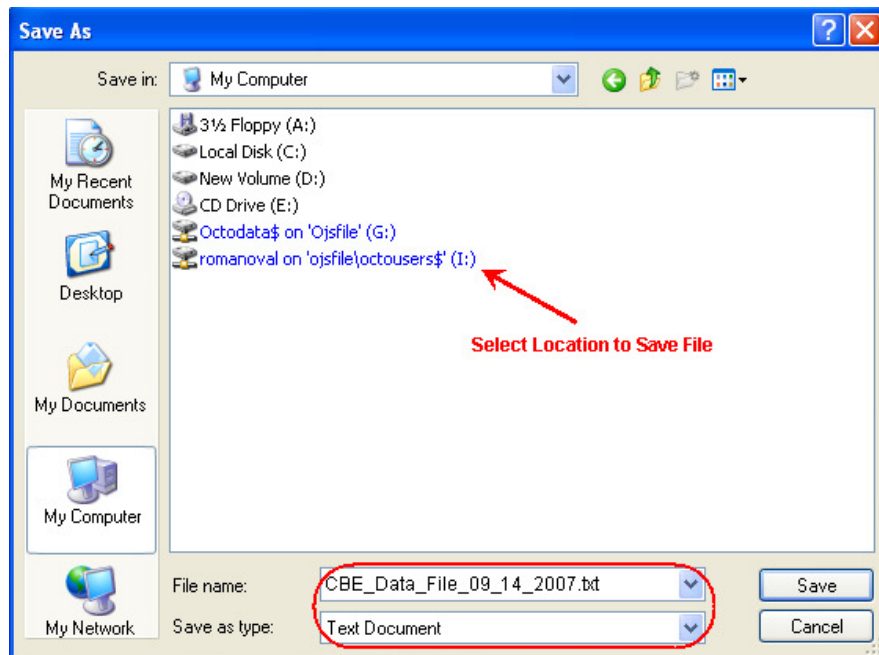


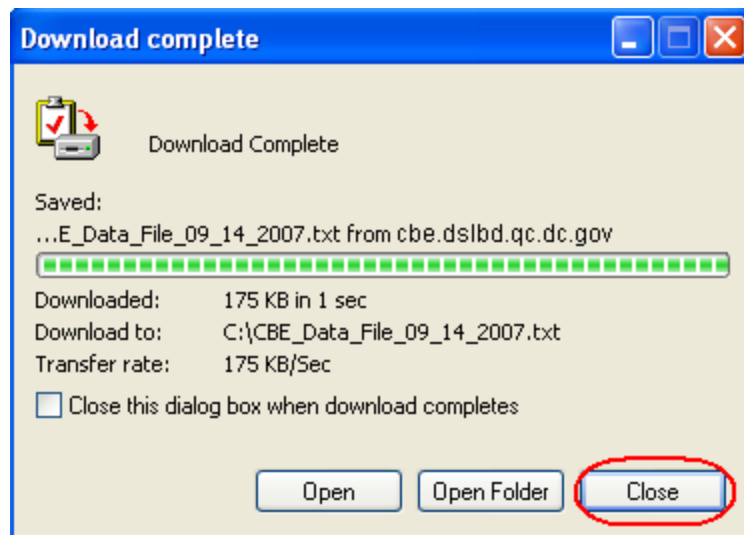
Figure 28: Save As Dialog Box

The system defaults the data file name to CBE\_Data\_File\_(current date) but you may rename it and choose where on your local or network drives to save the file.



You **must** select the "Save as type" to be Text Document (\*.txt)

Select the "Save" button on the Save As dialog box to create the data file. Once the file has been created and saved, a message appears stating, that the save was successful. You may "Close" the popup window.



*Figure 29: Download Complete Popup Window*

## 5 Compliance Manager

### 5.1 Compliance Manager Administration

The Compliance Manager Administration screen displays. Select one of the options listed.

**Compliance Manager Administration**

Help  
Log Out Compliance Manager

View LSDBE Plans	View LSDBE plans by contract, prime contractor, or subcontractor.
View Contract Payments	View payments associated with an active contract (verified, unverified, and/or disputed).
View Subcontractor Payments	View payments to a LSDBE subcontractor (verified, unverified, and/or disputed).
Generate Payments Report	Generate and print a report of contractor payments to subcontractors.
Process Business Opportunities	Approve or reject opportunities submitted by prime contractors or by the public.
Generate Agency Reports	Monitor an agency's spending against its LSDBE goal and print report.
Add Purchases Not Recorded in PASS	Add agency purchases not recorded in the PASS system.
Generate Reports	Generate a variety of certification and purchase order summary reports.
Update Profile	Update your contact information.
Change Password	Change your password.
Log Out	Log out of application.

Figure 30: Compliance Manager Administration Screen

### 5.2 View CBE Plans

Selecting the “View CBE Plans” button displays the following screen. The default view displays all active CBE plans in the database. This will most likely take several pages to display.

Enter criteria below to search through the current contracts that have subcontracting plans. Select the **View** icon to view the associated subcontracting plan. Select any column header to sort the table by that column's values.

**Prime Contractor**  
Company Name:  Find FEIN:

**LSDBE Subcontractor**  
Company Name:  Find FEIN:

Contract No.:

Search

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Contract No.	Prime Contractor	Caption	Amount	Award Date	End Date	Agency	
PO102033	EastBanc Technologies	My Name	\$332.00	01/02/2003	01/04/2006	OCTO	
DCBE-2005-T-0042	EastBanc Technologies	FLSA SUBJECT MATTERS EXPERTS FOR CLASSIFICATION REFORM PROJECT	\$604,578.50	09/09/2005	09/08/2006	UDC	
DCBE-2005-T-0042	EastBanc Technologies	FLSA SUBJECT MATTERS EXPERTS FOR CLASSIFICATION REFORM PROJECT	\$604,578.50	09/09/2005	09/08/2006	UDC	
DCBE-2005-T-0042	EastBanc Technologies	FLSA SUBJECT MATTERS EXPERTS FOR CLASSIFICATION REFORM PROJECT	\$604,578.50	09/09/2005	09/08/2006	UDC	
POFA-2002-C-0003	Test-Company-forUserID-184	Jaw-Test-ContractGenerated-80254	\$4,757,000.00	12/06/2005	06/19/2006	MPD	
POFA-2002-C-0003	Test-Company-forUserID-185	Jaw-Test-ContractGenerated-56349	\$6,119,000.00	04/04/2005	05/09/2006	MPD	
POFA-2002-C-0003	Test-Company-forUserID-187	Jaw-Test-ContractGenerated-3750	\$1,834,000.00	05/01/2005	08/16/2006	MPD	
POFA-2002-C-0003	Test-Company-forUserID-190	Jaw-Test-ContractGenerated-82735	\$1,072,000.00	05/03/2005	02/28/2006	MPD	
POFA-2002-C-0003	Test-Company-forUserID-191	Jaw-Test-ContractGenerated-64705	\$3,137,000.00	02/04/2005	07/25/2005	MPD	
POFA-2002-C-0003	Test-Company-forUserID-192	Jaw-Test-ContractGenerated-2965	\$1,199,000.00	12/21/2005	11/17/2006	MPD	

<< Go Back

Figure 31: View CBE Plans Screen




1. The default view shows all active contracts where CBE subcontractor plans are required in the results table. This may be several pages. You should enter some search information in the search box to narrow down the results table.
2. Enter information into any or all of the fields as desired.

Enter **Prime Contractor** search criteria by Company Name and/or FEIN. If you enter two or more letters into the name field, select the “Find” button to see a list of companies that have those letters in the name. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **CBE Subcontractor** search criteria by Company Name and/or FEIN. If you enter two or more letters into the name field, select the “Find” button to see a list of companies that have those letters in the name. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **Contract Number** search criteria by entering the whole contract number into the field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

3. All active contracts with CBE subcontracting plan requirements that meet your search criteria will be displayed. If there is more than one page, go to the next page by selecting the number in the list at the top right of the table. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A). To select any one plan to view, select the View icon  at the end of the row. This will take you to the next screen.

**Compliance Administration**  
View Contract Payments











Enter criteria below to search through the current contracts that have LSDBE subcontracting payment activity.

Contract No.:  Prime FEIN:  Prime Contractor:

Award Date:  mm dd yyyy End Date:  mm dd yyyy

Agency: All  Include Payments: ☒ Approved ☒ Disputed ☒ Unverified

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Contract No.	Prime Contractor	Caption	Amount	Award Date	End Date	Agency	
112224371	Test-Company-forUserID-231	Fleet Management & Maintenance	\$5,493,000.00	03/16/2005	09/21/2005	MPD	
113969878	Test-Company-forUserID-224	Fleet Management & Maintenance	\$722,000.00	12/12/2004	04/15/2006	MPD	
124127653	Test-Company-forUserID-187	Fleet Management & Maintenance	\$1,834,000.00	05/01/2005	08/16/2006	MPD	
155918946	Test-Company-forUserID-230	Fleet Management & Maintenance	\$4,297,000.00	04/15/2005	08/17/2006	MPD	
1907-2003-D-1999 TaskOrder: 3875	Test-Company-forUserID-261	Gen-Contract for company: Test-Company-forUserID-261. Task Order Num added.	\$1,143,000.00	03/16/2005	02/09/2006	OCTO	
1907-2003-D-1999 TaskOrder: 3875 MOD: 595	Test-Company-forUserID-261	Gen-Contract for company: Test-Company-forUserID-261. TaskOrder Modification Num added.	\$1,149,000.00	03/16/2005	02/09/2006	OCTO	
204915996	Test-Company-forUserID-185	Fleet Management & Maintenance	\$6,119,000.00	04/04/2005	05/09/2006	MPD	
212313584	Test-Company-forUserID-263	Fleet Management & Maintenance	\$3,552,000.00	12/07/2004	02/04/2006	MPD	
275526663	Test-Company-forUserID-193	Fleet Management & Maintenance	\$3,479,000.00	12/10/2005	09/08/2006	MPD	
330088168	Test-Company-forUserID-197	Fleet Management & Maintenance	\$779,000.00	07/19/2005	10/08/2006	MPD	

<< Go Back



Figure 32: View CBE Plans Detailed Screen

This is the detailed CBE plan screen. All information is read-only.

The header information for a contact is displayed. Header information comes from OCP and consists of:

- Contract Number, MOD or Task Order numbers (if applicable)
- Amount of the contract
- Agency providing the contract
- Prime contractor (“Awarded To”)
- Date of Award (date the contract was given to the prime contractor)
- Contract End Date (date the contract is set to expire)
- Caption (a brief description or title for the contract as recorded in OCP's database)

Information for each CBE subcontractor is provided in a table. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A). The display includes Subcontractor's Name, Award Date, Plan Dollars that were set aside for the subcontractor, and Plan % (percentage of the set-aside dollars for that particular subcontractor; if you add the plan percentages together, they equal 100 percent.)



Select the Print icon **Print** to print out a copy of this page.

### 5.3 View Contract Payments

Selecting “View Contract Payments” displays the following screen.

**Compliance Administration**  
View Contract Payments

Help  
Log Out Compliance Manager

Enter criteria below to search through the current contracts that have LSDBE subcontracting payment activity.

Contract No.:  Prime FEIN:  Prime Contractor:

Award Date:  mm dd yyyy End Date:  mm dd yyyy

Agency: All  Include Payments: ☒ Approved ☒ Disputed ☒ Unverified

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Contract No.	Prime Contractor	Caption	Amount	Award Date	End Date	Agency	
112224371	Test-Company-forUserID-231	Fleet Management & Maintenance	\$5,493,000.00	03/16/2005	09/21/2005	MPD	
113989878	Test-Company-forUserID-224	Fleet Management & Maintenance	\$722,000.00	12/12/2004	04/15/2006	MPD	
124127653	Test-Company-forUserID-187	Fleet Management & Maintenance	\$1,834,000.00	05/01/2005	08/16/2006	MPD	
155918946	Test-Company-forUserID-230	Fleet Management & Maintenance	\$4,297,000.00	04/15/2005	08/17/2006	MPD	
1907-2003-D-1999 Task Order: 3875	Test-Company-forUserID-261	Gen-Contract for company: Test-Company-forUserID-261. Task Order Num added.	\$1,143,000.00	03/16/2005	02/09/2006	OCTO	
1907-2003-D-1999 Task Order: 3875 MOD: 595	Test-Company-forUserID-261	Gen-Contract for company: Test-Company-forUserID-261. Task Order Modification Num added.	\$1,149,000.00	03/16/2005	02/09/2006	OCTO	
204915996	Test-Company-forUserID-185	Fleet Management & Maintenance	\$6,119,000.00	04/04/2005	05/09/2006	MPD	
212313584	Test-Company-forUserID-263	Fleet Management & Maintenance	\$3,552,000.00	12/07/2004	02/04/2006	MPD	
275526663	Test-Company-forUserID-193	Fleet Management & Maintenance	\$3,479,000.00	12/10/2005	09/08/2006	MPD	
330088168	Test-Company-forUserID-197	Fleet Management & Maintenance	\$779,000.00	07/19/2005	10/08/2006	MPD	

<< Go Back

Figure 33: View Contract Payments Screen

1. The default view shows all active subcontractors with any kind of payments attached to them in the results table. This may be several pages. You should enter some search information in the search box to narrow down the results table.
2. Enter information into any or all of the fields as desired. If you enter multiple fields, the system will display only those results that match all entered criteria.

Enter **Contract Number** search criteria by entering the whole contract number into the field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **Prime Contractor** search criteria by FEIN or Company Name. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.


Enter **Award Date** search criteria in mm/dd/yyyy format. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **End Date** search criteria in mm/dd/yyyy format. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Enter **Agency** search criteria by selecting an agency from the drop-down list. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Select **Payment** search criteria by checking the boxes in front of the type of payments you want to see. If you do not want to see a particular type of payments, uncheck the box and that type will not show up in the results table. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

3. All active subcontractor payments that meet all search criteria entered will be displayed in the results table. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A). To view the details for a particular payment, select the View

 at the end of the row. This will take you to the detailed screen for that payment.

**Compliance Administration**  
View Contract Payments

Narrow your search by entering criteria to locate a specific subcontractor. View payment information associated with this contract below. Select any column header to sort the table by that column's values.

**Contract Information**

Contract No.: POFA-2002-C-0003      Amount: \$722,000.00      Agency: MPD  
 Awarded To: Test-Company-for-UserID-224      Date of Award: 12/12/2004      Contract End Date: 04/15/2006  
 Caption: Jaw-Test-ContractGenerated-53003

**Search Subcontractor Payments**

Subcontract Name:

Payment Issue Date  
 From:     To:

Include Payments: ☒ Approved ☒ Disputed ☒ Unverified

Subcontract Name	Services/Goods Provided	Issue Date	Payment Amount	Payment Status	Payment Comment
Test-Company-for-UserID-181	Nothing, this is a code generated data.	01/11/2005	\$180,500.00	Disputed	
Test-Company-for-UserID-181	Nothing, this is a code generated data.	01/16/2005	\$135,375.00	Disputed	
Test-Company-for-UserID-181	Nothing, this is a code generated data.	01/11/2005	\$101,531.25	Approved	

Figure 34: View Contract Payments detail Screen

- The Contract Information box is read-only and contains the following contract information:
  - Contract Number, MOD or Task Order numbers (if applicable)
  - Amount of the contract
  - Agency providing the contract
  - Prime contractor ("Awarded To")
  - Date of Award (date the contract was given to the prime contractor)
  - Contract End Date (date the contract is set to expire)
  - Caption (a brief description or title for the contract as recorded in OCP's database)

The default view shows all payments for the contract. This may be several pages of information. To narrow down the display, enter information into any or all of the fields as desired. If you enter multiple fields, the system will display only those results that match all entered criteria.

Enter **Subcontractor Name** in the search field. If this is the only criteria you want to see, select the "Search" button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the "Search" button.

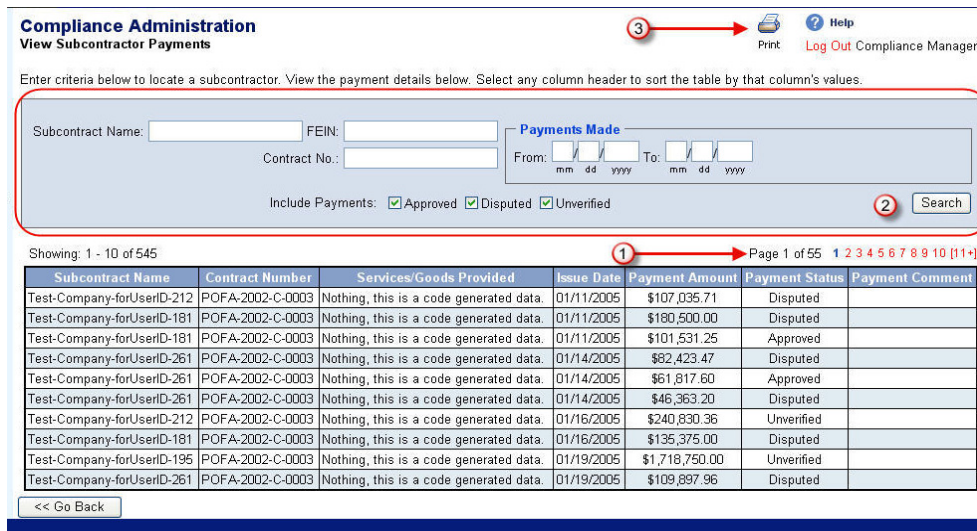
Enter **Payment Issue Date** search criteria in the fields provided. You should enter a date range in mm/dd/yy format, with both a from and to dates. If this is the only criteria you want to see, select the "Search" button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the "Search" button.

Select **Payment** search criteria by checking the boxes in front of the type of payments you want to see. If you do not want to see a particular type of payments, uncheck the box and that type will not show up in the results table. If this is the only criteria you want to see, select the "Search" button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the "Search" button.

2. All subcontractor payments that meet your search criteria will be displayed in the results table. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A). Select the Print icon to print out a copy of the page.

## 5.4 View Subcontractor Payments

Selecting the “View Subcontractor Payments” button displays the following screen.



**Compliance Administration**  
View Subcontractor Payments

Enter criteria below to locate a subcontractor. View the payment details below. Select any column header to sort the table by that column's values.


Subcontract Name:  FEIN:   
Contract No.:  Payments Made From:  To:   
Include Payments: ☒ Approved ☒ Disputed ☒ Unverified

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Subcontract Name	Contract Number	Services/Goods Provided	Issue Date	Payment Amount	Payment Status	Payment Comment
Test-Company-forUserID-212	POFA-2002-C-0003	Nothing, this is a code generated data.	01/11/2005	\$107,035.71	Disputed	
Test-Company-forUserID-181	POFA-2002-C-0003	Nothing, this is a code generated data.	01/11/2005	\$180,500.00	Disputed	
Test-Company-forUserID-181	POFA-2002-C-0003	Nothing, this is a code generated data.	01/11/2005	\$101,531.25	Approved	
Test-Company-forUserID-261	POFA-2002-C-0003	Nothing, this is a code generated data.	01/14/2005	\$82,423.47	Disputed	
Test-Company-forUserID-261	POFA-2002-C-0003	Nothing, this is a code generated data.	01/14/2005	\$61,817.60	Approved	
Test-Company-forUserID-261	POFA-2002-C-0003	Nothing, this is a code generated data.	01/14/2005	\$46,363.20	Disputed	
Test-Company-forUserID-212	POFA-2002-C-0003	Nothing, this is a code generated data.	01/16/2005	\$240,830.36	Unverified	
Test-Company-forUserID-181	POFA-2002-C-0003	Nothing, this is a code generated data.	01/16/2005	\$135,375.00	Disputed	
Test-Company-forUserID-195	POFA-2002-C-0003	Nothing, this is a code generated data.	01/19/2005	\$1,718,750.00	Unverified	
Test-Company-forUserID-261	POFA-2002-C-0003	Nothing, this is a code generated data.	01/19/2005	\$109,897.96	Disputed	

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Figure 35: View Subcontractor Payments Screen

1. The default view displays all active subcontractors with any kind of payments attached to them that are in the database.
2. To narrow down the number of items displayed, enter search criteria in the top box and select the “Search” button. You can fine tune what is displayed by selecting any combination of payments to include (checked boxes) or exclude (unchecked boxes).
3. To print out the results, select the Print icon  **Print**.

## 5.5 Generate Payments Report

Selecting the “Generate Payments Report” button displays the following screen.

Figure 36: Print Payment Reports Screen

1. Enter criteria to customize the output of your Payments Report. Enter as much or as little information in the fields as you desire.

Enter **Payments** criteria by checking the payment types you want to include in your report and un-checking those to exclude from your report. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

Enter **Prime Contractor** criteria by entering either the Company Name or FEIN into the fields. If you enter two or more letters into the Company Name field, select the “Find” button to see a list of companies that have those letters in the name and select the desired one. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

Enter **CBE Subcontractor** criteria by entering either the Company Name or FEIN into the fields. If you enter two or more letters into the Company Name field, select the “Find” button to see a list of companies that have those letters in the name and select the desired one. If you enter two or more letters into the name field, select the “Find” button to see a list of companies that have those letters in the name. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

Enter **Date Range** criteria by entering a “From” and “To” dates in mm/dd/yyyy format. If this is the only criteria you want to see on your report, select the “Generate Report” button, and the results will be displayed in a new screen. If you want to enter other criteria, you may do so before selecting the “Generate Reports” button.

2. Selecting “**Generate Reports**” after entering some criteria will allow the system to gather all results that meet the criteria you entered. The results are displayed on a new screen.

For the following example, Test-Company-forUserID-183 was input as the Subcontractor Name.



<b>Payments Report</b> <b>For Test-Company-forUserID-183</b> <b>From 02/11/2005 to 01/20/2006</b>						
This report contains all approved, disputed, and unverified payments for the date range indicated above.						
Select any column header to sort the table by that column's values.						
Issue Date	Prime Contractor	Payment Status	Payment Amount	Contract No.	Payment Comment	Services/Goods Provided
02/11/2005	Test-Company-forUserID-251	Approved	\$116,734.69	POFA-2002-C-0003		Nothing, this is a code generated data.
02/11/2005	Test-Company-forUserID-251	Approved	\$87,551.02	POFA-2002-C-0003		Nothing, this is a code generated data.
02/21/2005	Test-Company-forUserID-251	Approved	\$65,663.27	POFA-2002-C-0003		Nothing, this is a code generated data.
04/29/2005	Test-Company-forUserID-236	Disputed	\$384,714.29	POFA-2002-C-0003		Nothing, this is a code generated data.
04/29/2005	Test-Company-forUserID-236	Approved	\$1,154,142.86	POFA-2002-C-0003		Nothing, this is a code generated data.
07/12/2005	Test-Company-forUserID-205	Approved	\$391,285.71	POFA-2002-C-0003		Nothing, this is a code generated data.
07/12/2005	Test-Company-forUserID-205	Unverified	\$97,821.43	POFA-2002-C-0003		Nothing, this is a code generated data.
07/12/2005	Test-Company-forUserID-205	Approved	\$293,464.29	POFA-2002-C-0003		Nothing, this is a code generated data.
07/17/2005	Test-Company-forUserID-205	Disputed	\$130,428.57	POFA-2002-C-0003		Nothing, this is a code generated data.
07/27/2005	Test-Company-forUserID-205	Approved	\$130,428.57	POFA-2002-C-0003		Nothing, this is a code generated data.
08/04/2005	Test-Company-forUserID-204	Disputed	\$313,316.33	POFA-2002-C-0003		Nothing, this is a code generated data.
08/14/2005	Test-Company-forUserID-204	Unverified	\$234,987.24	POFA-2002-C-0003		Nothing, this is a code generated data.
08/14/2005	Test-Company-forUserID-204	Disputed	\$417,755.10	POFA-2002-C-0003		Nothing, this is a code generated data.
08/14/2005	Test-Company-forUserID-204	Disputed	\$1,253,265.31	POFA-2002-C-0003		Nothing, this is a code generated data.
08/19/2005	Test-Company-forUserID-204	Approved	\$417,755.10	POFA-2002-C-0003		Nothing, this is a code generated data.
08/24/2005	Test-Company-forUserID-204	Disputed	\$704,961.73	POFA-2002-C-0003		Nothing, this is a code generated data.
01/15/2006	Test-Company-forUserID-199	Disputed	\$331,541.55	POFA-2002-C-0003		Nothing, this is a code generated data.
01/15/2006	Test-Company-forUserID-199	Unverified	\$248,656.16	POFA-2002-C-0003		Nothing, this is a code generated data.
01/20/2006	Test-Company-forUserID-199	Approved	\$186,492.12	POFA-2002-C-0003		Nothing, this is a code generated data.
01/20/2006	Test-Company-forUserID-199	Disputed	\$442,055.39	POFA-2002-C-0003		Nothing, this is a code generated data.

Print This Report      Return to Previous Page

Figure 37: Print Payments Report – Generate Report Selected

Select “Print This Report” to pop-up a print dialog window. For your ease of reading, you may wish to set your printer preferences or options to print this report in a landscape view. You should already have a printer set as your default printer in order to do this. The following figure depicts one type of printer window that you may see. The actual window you see depends on your network configuration, printer, and what versions of software you are running on your computer and printer. Select the “Print” button to send the report to the printer.

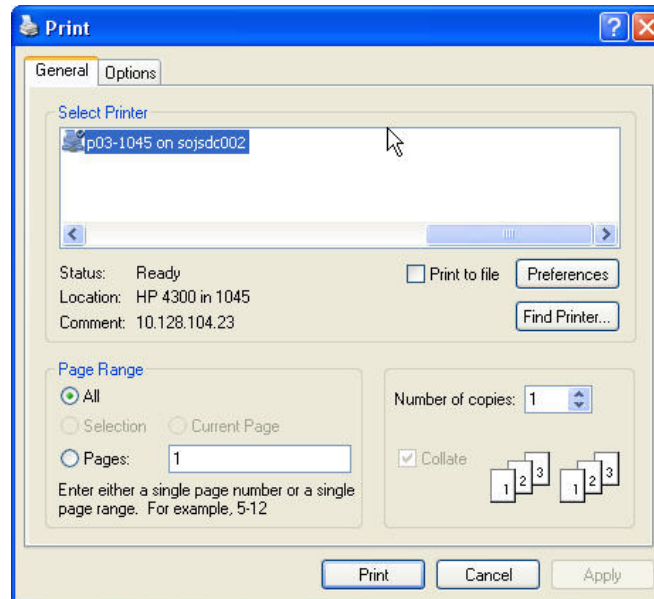


Figure 38: Print Pop-up Window

## 5.6 Process Business Opportunities

Business opportunities allow both companies and agencies to “advertise” for additional help as well as allowing certified CBE companies to look for new or additional work. Opportunities are submitted in two ways. Prime contractors (vs. public agencies and companies) may submit an opportunity for an existing contract while they are logged into the application. Any agency or company can submit an opportunity via the Internet. All opportunities are reviewed and either approved or rejected. Emails are automatically sent to the companies that sent in the opportunities letting them know the status.

Selecting the “Process Business Opportunities” button displays the following screen.

**Compliance Administration**  
Process Business Opportunities

Enter keywords and search criteria below to view subcontracting opportunities. Select an Opportunity Name to edit, approve or reject it.

Search

☐ Hide Public ☐ Hide Prime

Opportunity Name	Source	Begin Date	Bid Due Date	Opportunity Value	Agency or Company
test opp 7	Public	02/02/2006	03/03/2006	100000.00	test.org

Figure 39: Approve Business Opportunities Screen

The default view lists all opportunities submitted by both the public and prime contractors.

1. If the display is very large, you may want to narrow down your search. Enter a word or phrase to search for a specific opportunity. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Check the “Hide Public” box to display only prime-contractor submitted opportunities. Check the “Hide Prime” box to display only the publicly submitted opportunities. Do not check both boxes or else nothing will be displayed. The default is to display both kinds of opportunities (both boxes unchecked). If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

2. The submitted opportunities are displayed in a table with the following fields:
  - Opportunity Name (brief description of the opportunity)
  - Source (public or prime)
  - Begin Date (date the opportunity is available)
  - Bid Due Date (date bids are due into the agency or company)
  - Opportunity Value (dollar amount available)
  - Agency or Company (that submitted the opportunity)

Choose an opportunity by selecting the Opportunity Name in order to display the details in a new screen.

**Compliance Administration**  
Process Business Opportunities

To edit this opportunity, make the changes below and select Save. To post this opportunity on the DSLBD website, select Publish to Web. If the opportunity is not appropriate for the website, select Reject.

Organization: Business Inc. Phone: 202 222 2222  
 Email: cheryl.look@dc.gov Contact Name: Cheryl Look  
 Opportunity Name: test opp 7 Opportunity Value: 100000.00  
 Begin Date: 02/02/2006 Closing Date: 04/04/2006  
 Bid Due Date: 03/03/2006 Work Location: Downtown  
 Bid Requirements: The companies responding must be US citizen or green card holders.  
 Description of Work: Will be preparing slides and pictures for publication

Edit NIGP Code(s) No selected NIGP codes  
 << Go Back Save Publish to Web Reject

Figure 40: Subcontracting Opportunity Submitted by a Public Company

Select an opportunity to see the details of the submission. You can edit some of the fields if necessary (i.e., wording, punctuation, grammar).

The difference between a prime-company opportunity submitted via CBE Online and one sent in via the Internet is that the prime's subcontracting opportunity is specific to a contract that they are currently associated with.

Select "Publish to Web" to accept the opportunity or "Reject" to reject the opportunity. An email notifies the submitter when the opportunity has been rejected.

## 5.7 Generate Agency Reports

Selecting "Generate Agency Reports" displays the following screen.

**Compliance Administration**  
Generate Agency Reports

Select an agency:

- Department of Corrections
- Department of Employment Services
- Department of Health
- Department of Housing & Community Development
- Department of Human Services
- Department of Insurance, Securities, & Banking
- Department of Mental Health
- Department of Motor Vehicles
- Department of Parks & Recreation
- Department of Public Works
- Department of Youth Rehabilitation Services
- District Department of Transportation
- District of Columbia Retirement Board
- Emergency Health and Medical Services Administration
- Emergency Management Agency
- Energy Office

Continue

Figure 41: Generate Agency Reports Screen

Enter an Agency from the drop-down list and select "Continue".



The following screen displays the agency goals with all purchase orders in the system to date; this will most likely be several pages.

**Compliance Administration**  
Generate Agency Reports

Select an agency below to view its compliance report.

Agency:

Expendable Budget: \$80,000,000.00      Annual SBE Goal: \$50,000,000.00  
Fiscal Year: 2006      Percentage of Expendable Budget: 62.5%  
Purchase Orders to Date: \$21,349,344.02      Percentage of Goal: 42.7%

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Vendor Name	PO/Contract Number	Amount	Date	Description	Source
FAITH OFFICE PRODUCTS	PO104447	\$100.00	11/15/2005	General Services	PASS
NATIONAL ASSOCIATES INC	PO104533	\$32.55	11/29/2005	Prof Services/Public Safety	PASS
STANDARD OFFICE SUPPLY	PO104515	\$100.00	12/09/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO104436	\$200.00	11/15/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO104430	\$275.60	11/15/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO102056	\$369.45	11/03/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO102059	\$393.98	11/03/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO102060	\$393.98	11/03/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO102061	\$393.98	11/03/2005	General Services	PASS
STANDARD OFFICE SUPPLY	PO102062	\$393.98	11/03/2005	General Services	PASS

Figure 42: View Agency Compliance Screen

- The selected agency's fiscal year goals that were input by the Agency at the start of the fiscal year are displayed. Agencies are allowed to input their goals only once per fiscal year. The fields displayed are:
  - Expendable Budget
  - Annual CBE Goal—the amount of the expendable budget that the agency has committed to set aside for CBE awards
  - Fiscal Year—the date of the displayed budget
  - Percentage of Expendable Budget—the percentage of the expendable budget that was set aside for CBE awards
  - Purchase Orders to Date—the total of all purchase order that are currently in PASS
  - Percentage of Goal—how much of the total set-aside for CBE awards has been awarded.

The Purchase Order (PO) information shown in the table at the bottom is updated regularly from PASS and is read-only. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A).

- The “Update” button will be shown if the agency has entered their fiscal year goals. Use this button to open up the Expendable Budget and Annual CBE Goal fields for editing. Enter the changes and select “Save.”



- Select the Print icon **Print** to print out a copy of this report.

## 5.8 Add Purchases Not Recorded in PASS

Selecting "Add Purchases Not Recorded in PASS" from the Administration screen will display the following screen.

**Compliance Administration**  
**Add Purchases Not Recorded in PASS**

Add information on purchases from LSBEs that were not recorded in the PASS system. You may edit or delete any entry until you go back to the previous screen.

\* all fields are required

Agency: -- please select an agency --

Vendor Name:  Search

Identifier or Authorization Code:

Amount:  Date:    Source: -- please select a source --

Description:

Add

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Vendor Name	PO/Contract No.	Amount	Date	Description	Source		
New Company 4	asd	\$123.00	11/11/2001	asdf dsf sfd	DCSS		
Javier's Company	nhhng	\$111.00	11/11/2001	dfeyz	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		
EastBanc Technologies	sc	\$12.00	11/11/2001	sd	DCSS		

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Figure 43: Add Purchases Not Recorded in PASS Screen

1. Select an Agency from the dropdown list.
2. Enter a Vendor name. You may enter part of a name and select Search to see a list of all vendors that match the search criteria.
3. Enter an Amount in the Amount field.
4. Enter the Date the purchase was made.
5. Select a Source from the drop-down field. Your choices are DCSS (DC Supply Schedule) or PC (Purchase Card).
6. Enter Identification or Authorization Code (typically, when PC is selected as the Source this field will be utilized). This field may be left blank.
7. Enter a Description of the purchase.
8. Select Add to enter the purchase into the list.

Select the Edit icon for a specific item to change the fields, if necessary. The fields above the table will populate with that item's information. Make your changes in the fields and Select Apply Changes.

Select the Delete icon to remove an item from the list.

## 5.9 Generate Reports- Selecting “Generate Reports” from the Administration screen will display the following screen.

**Generate Reports** Log Out Certification Manager

Choose to run the report either by **Company** or **Application**, then select to view **Detailed** or **Summary** report output. Choose **Report Criteria** by clicking on the criteria name or the plus sign. You may also determine what information should be displayed on the report by selecting up to eight columns. To save the search, select the desired criteria, enter Search Name and then press **Save**. To run saved searches, select the search from the **Saved Searches** drop-down and then select **Generate Report** to view and print the report.

**Report By:** ☒ Application ☐ Company 1

**4 Saved Searches:** 4 -- please select saved criteria --

**Select Report Type:** ☒ Detailed ☐ Summary (Totals Only) 2

**Select Report Criteria:** 3

- ☒ Application Type and Status
- ☒ Business Information / Location
- ☒ Services/NIGP Codes
- ☒ Principal Owner

**Customize your report output - select up to eight (8) columns:**

<input type="checkbox"/> Address/Phone	<input checked="" type="checkbox"/> Application Status	<input checked="" type="checkbox"/> Application Type	<input type="checkbox"/> Assigned Specialist	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">5</span> <input type="checkbox"/> Business Structure
<input checked="" type="checkbox"/> CBE#	<input type="checkbox"/> Certification Categories	<input type="checkbox"/> Company Status	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Email Address (Principal Contact)
<input checked="" type="checkbox"/> Expiration Date	<input type="checkbox"/> FEIN	<input type="checkbox"/> Industry Groups	<input type="checkbox"/> NIGP Codes	<input type="checkbox"/> Owners
<input type="checkbox"/> Primary Business Services	<input type="checkbox"/> Principal Owner's Citizenship	<input type="checkbox"/> Principal Owner's Gender	<input type="checkbox"/> Principal Owner's Name	<input type="checkbox"/> Principal Owner's Race
<input type="checkbox"/> Principal Contact Name/Phone	<input type="checkbox"/> Revenue (Average 3 years)	<input type="checkbox"/> Status Date	<input type="checkbox"/> Trade Divisions	<input type="checkbox"/> Quadrant
<input type="checkbox"/> Ward	<input type="checkbox"/> Zip Code	<input type="checkbox"/> # of Site Visits		

Figure 44: Generate Reports Screen

1. Select **Report By:** Application or Company.
2. Select **Report Type:** Detailed or Summary (Totals Only). Detailed is the default selection when you first access this screen.
3. Select the desired **Report Criteria** from the following groups:
  - Application Type and Status
  - Business Information/Location
  - Services/NIGP Codes
  - Principal Owner

Selecting the plus (+) sign next to each group will open selection criteria fields for that group. (as illustrated on the screenshot below for Application Type and Status)

Report By: ☐ Application ☒ Company

Saved Searches: -- please select saved criteria --

Select Report Type: ☒ Detailed ☐ Summary (Totals Only)

Select Report Criteria:

**Application Type and Status**

Select criteria to view information for all company applications or by the company certification status. You may also view applications that expire in the selected date range or by the specific status assigned date.

☒ Range ?  
☐ Snapshot ?  
☐ Daily Snapshot ?

Company Status: Active

Application Type: All  
 Certification  
 Joint Venture  
 Recertification

Assigned Specialist: All  
 Alle, Yvonne  
 Beasley, Corey  
 BeasleyM, Corey

Expiration Date Range: -- select dates --

Status From Date: 01/01/1900

Status To Date: 3/5/2009

+ Business Information / Location  
 + Services/NIGP Codes  
 + Principal Owner

Customize your report output - select up to eight (8) columns:

<input type="checkbox"/> Address/Phone	<input checked="" type="checkbox"/> Application Status	<input checked="" type="checkbox"/> Application Type	<input type="checkbox"/> Assigned Specialist	<input type="checkbox"/> Business Structure
<input checked="" type="checkbox"/> CBE#	<input type="checkbox"/> Certification Categories	<input type="checkbox"/> Company Status	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Email Address (Public Contact)
<input checked="" type="checkbox"/> Expiration Date	<input type="checkbox"/> FEIN	<input type="checkbox"/> Industry Groups	<input type="checkbox"/> NIGP Codes	<input type="checkbox"/> Owners
<input type="checkbox"/> Primary Business Services	<input type="checkbox"/> Principal Owner's Citizenship	<input type="checkbox"/> Principal Owner's Gender	<input type="checkbox"/> Principal Owner's Name	<input type="checkbox"/> Principal Owner's Race
<input type="checkbox"/> Public Contact Name/Phone	<input type="checkbox"/> Revenue (Average 3 years)	<input type="checkbox"/> Status Date	<input type="checkbox"/> Trade Divisions	<input type="checkbox"/> Quadrant

Figure 45: Application Type and Status – Selection Criteria

You may select criteria in only one or in all four groups. If you do not make any selections, i.e. leave “ALL” as a default criteria in each group, report will display all the records in the database.

For a Company Report you may select one of the three options to run a company report within a specific timeframe:

- **Range-** allows you to run a "From-To" date range company report.
- **Snapshot-** allows you to run a one day company report.
- **Daily Snapshot-** allows you run a trend line report calculated for each day within the chosen date range.

1. **Enter Search Name** box allows you to save your selected search criteria for future re-runs. Enter the Search Name and then select Save. Newly saved search will appear in the **Saved Searches** drop-down at the top of the page.
2. **Customize your report output** box will only be shown if **Detailed** Report Type is selected. You may choose what information will be displayed on the report based on the chosen criteria by selecting up to eight (8) report columns.

The following columns are pre-selected on the screen: Application Status, Application Type, CBE #, Company Name, and Expiration Date. You may de-select these columns and choose different ones for your report. For example, if your criteria is all the “Certification” applications that are “Pending”, you may choose to see such information on the report as Company Name, CBE #, Assigned Specialist, Status Date and Public Contact Name/Phone.

If **Summary** Report Type is selected, **Select Group By** options box will be displayed on the screen.

The screenshot shows the 'Generate Reports' page. At the top right, there is a 'Log Out' link and 'Certification Manager'. Below the header, a paragraph explains how to run a report by Company or Application, select report criteria, and save searches. The 'Report By' section has radio buttons for 'Application' and 'Company'. The 'Select Report Type' section has radio buttons for 'Detailed' and 'Summary (Totals Only)', with the latter being selected and circled in red. Below this, the 'Select Report Criteria' section lists four criteria: 'Application Type and Status', 'Business Information / Location', 'Services/NIGP Codes', and 'Principal Owner'. The 'Select Group By options' section is highlighted with a red border and contains the text 'You may select up to 3 levels to group your Report Summary'. It has three dropdown menus for 'Group By Level 1', 'Group By Level 2', and 'Group By Level 3', each with a '-- select level --' option. Below the dropdowns is an 'Enter Search Name:' field with a 'Save' button. At the bottom, there are buttons for '<< Go Back', 'Reset', and 'Generate Report'.

Figure 46: Select Group By options for Summary Report Type

If **Summary** Report Type is selected, **Select Group By** options box will be displayed on the screen.

On your summary report, you may view three levels of totals. You must select at least one level – Group By Level 1. When level 1 is selected, you may select Group By Level 2 and then Group By Level 3. For example, your selection criteria is all “Certification” applications. For the group by options, you may choose the following:

- Group By Level 1 – Application Type
  - Group By Level 2 – Application Status
  - Group By Level 3 – Gender (principal owner’s gender).
  - Report output will then show three levels of totals:
    - By Application Type (Total # of Certification applications)
    - By Application Status (Total # of Certification applications for each status, i.e. Pending, Approved, Denied, etc.)
    - By Gender (Total # of Certification applications with female and male principal owner)
3. **Enter Search Name** box allows you to save your selected search criteria for future re-runs. Enter the Search Name and then select Save. Newly saved search will appear in the **Saved Searches** drop-down at the top of the page.
  4. Select “Generate Report” button to view the report. A sample detailed report is shown below.

(this control box will not be printed)  
[print entire report](#)   [close window](#)

**Results for the following Report Criteria:**  
 Application Type: **Certification**  
 Application Status: **Approved**  
 Expiration Date Range: **in 90 days**  
 Zip Code: **20005**

Tuesday, September 18, 2007 Total # of Records: 8

Application Status	Application Type	CBE#	Company Name	Expiration Date
Approved	Certification	LSZR 10200715654	Park USA, Inc.	10/20/2007
Approved	Certification	LS 11200716270	Yellow House Associates, LLC	11/08/2007
Approved	Certification	LSD 09200716498	Liberated Marketing & Communications, LLC	09/28/2007
Approved	Certification	LSD 10200716529	Hardie Industries, Inc.	10/20/2007
Approved	Certification	LS 09200716546	Levine & Associates, Inc.	09/28/2007
Approved	Certification	LS 09200716591	Bilingual Temps, LLC d.b.a. Multilingual Experts Interpreters & Translators	09/28/2007
Approved	Certification	LSDZR 09200716612	Inner city Development, LLC	09/28/2007
Approved	Certification	LSD 11200716631	Proxy Personnel, LLC	11/08/2007

Figure 47: Detailed Report

Criteria selected for the report is shown at the top of the page followed by the current date and total # of records found.

Select “close window” to return to the selection criteria screen. Select “print entire report” to pop-up a print dialog window. For your ease of reading, you may wish to set your printer preferences or options to print this report in a landscape view. You should already have a printer set as your default printer in order to do this. The following figure depicts one type of printer window that you may see. The actual window you see depends on your network configuration, printer, and what versions of software are running on your computer and printer. Select the “Print” button to send the report to the printer.

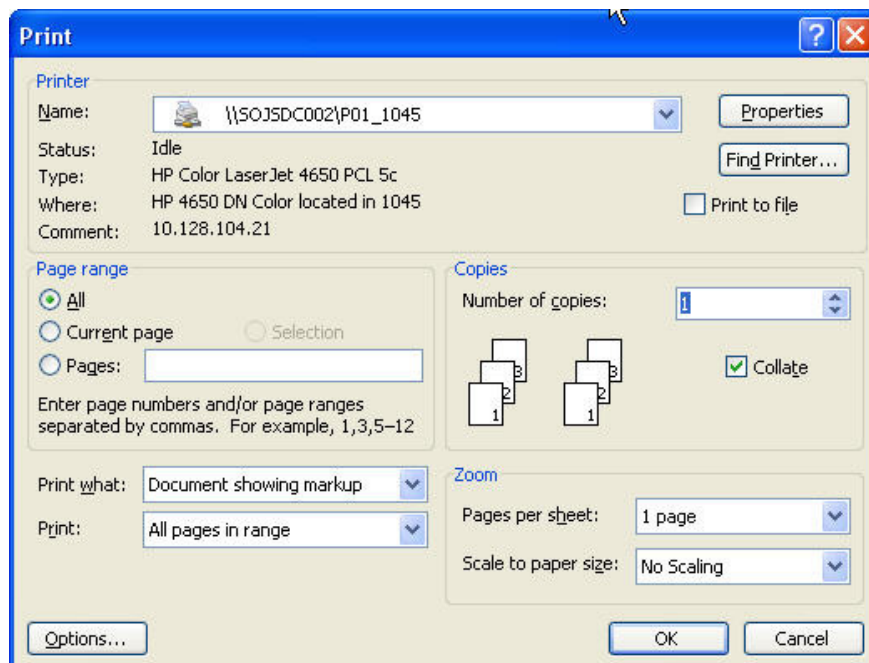


Figure 48: Print Window (your window may be different)

## 6 Certification Manager

Certification Managers and Certification Specialists can perform most of the same tasks. Managers have the added responsibility to assign specific applications to specialists and update incorrect FEINs.

### 6.1 Certification Manager Administration

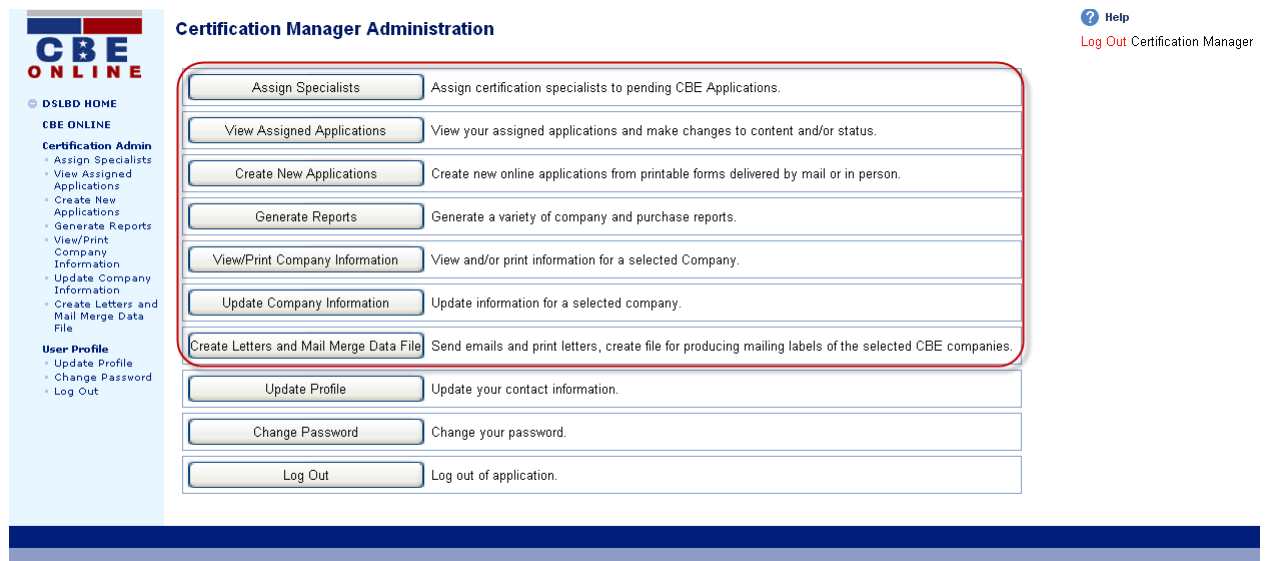


Figure 49: Certification Manager Administration Screen

### 6.2 Assign Specialists

Selecting “Assign Specialists” displays the following screen.



**Assign Specialists**[Log Out](#) Certification Manager

Enter criteria below to search through the current applications. To assign an application to a specialist select **Change** or **Assign** from the **Certification Specialist** Column.

Company:  Specialist: -- all specialists --  
 App Type: -- all application types -- Status: -- all statuses -- Search Reset

Showing: 1-10 of 4997 Page 1 of 500 1 2 3 4 5 6 7 8 9 10 [11+]

Date Submitted	App Type	Status	Company	Date Assigned	Certification Specialist
2/23/2009	Certification	Pending	Mayhan Enterprizes	Never	No specialist assigned <a href="#">Assign</a>
2/23/2009	Certification	Pending	Destined For Greatness LLC	Never	No specialist assigned <a href="#">Assign</a>
2/23/2009	Recertification	Pending	Construction and Safety Services, LLC	Never	No specialist assigned <a href="#">Assign</a>
2/23/2009	Certification	Pending	CLAY SERVICES INC	Never	No specialist assigned <a href="#">Assign</a>
2/23/2009	Recertification	Pending	Service Max Inc.	Never	No specialist assigned <a href="#">Assign</a>
2/23/2009	Certification	Pending	Christian Insurance Agency	2/23/2009	Roy, Yolanda <a href="#">Change</a>
2/20/2009	Certification	Pending	Simon Development & Construction, Corp.	Never	No specialist assigned <a href="#">Assign</a>
2/20/2009	Certification	Pending	Quality Interiors, LLC	2/20/2009	Roy, Yolanda <a href="#">Change</a>
2/20/2009	Recertification	Pending	Goldin & Stafford, Inc.	2/20/2009	Haynes, Makita <a href="#">Change</a>
2/20/2009	Recertification	Pending	B&B Floor Services, LLC	2/20/2009	Roy, Yolanda <a href="#">Change</a>

<< Go Back

Figure 50: Assign Specialists

A certification manager will be able assign a specific certification specialist to an application.

- The default view will list every application in the system. To narrow down the display, enter information into any or all of the fields as desired. If you enter multiple fields, the system will display only those results that match all entered criteria. Search criteria includes:

**Company**—enter a company name in the field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

**Specialist**—Select a specialist from the drop-down list, all applications assigned to this specialist will be displayed. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

**App Type**—Select a specific application type to display. Types available are: Certification, Joint Venture, Recertification, Upgrade or All. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

**Status**—Select a specific application status to be displayed. Status types are: Approved, Data Entry, , Application Submitted, Intake Review, Specialist Review, Manager Review, Provisional, Referred to LBOC, Denied, Held in Abeyance, Closed, Returned or Withdrawn. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Select the “Reset” button to clear all search fields. All results that meet your search criteria will be displayed. Selecting a column heading allows you to display the entire



table, sorted by the selected column heading. Selecting the heading one time will display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A).

- To assign a specialist or change specialists, select either the “Assign” or “Change” link in the Certification Specialist column. Select a specialist's name from the drop-down list and select the “Save” link; selecting Cancel returns to the previous original assignment without change.

**Certification Administration**  
Assign Specialists

Enter criteria below to search through the current applications. To assign an application to a specialist select **Change** or **Assign** from the **Certification Specialist** Column.

Company:  Specialist: -- all specialists --  
App Type: -- all application types -- Status: -- all statuses --

Showing: 1-10 of 20 Page 1 of 2 1 2

Date Submitted	App Type	Status	Company	Date Assigned	Certification Specialist
1/24/2006	Recertification	Pending	Test-Company-forUserID-224	1/24/2006	Queue, Suzy <a href="#">Change</a>
1/23/2006	Certification	Approved	Test Cheryl Company	1/19/2006	Poli4, TesterJane <a href="#">Change</a>
1/23/2006	Upgrade	Approved	test06	1/23/2006	Cert, Specialist <a href="#">Change</a>
1/23/2006	Certification	Approved	test06	1/23/2006	Cert, Specialist <a href="#">Change</a>
1/23/2006	Certification	Approved	test05	1/23/2006	Cert, Specialist <a href="#">Change</a>
1/22/2006	Certification	Pending	Help Test page	1/22/2006	Queue, Suzy <a href="#">Save</a> <a href="#">Cancel</a>
1/22/2006	Certification	Approved	test03	1/23/2006	Cert, Specialist <a href="#">Change</a>
1/22/2006	Certification	Pending	Andrey & Co 3	Never	No specialist assigned <a href="#">Assign</a>
1/21/2006	Certification	Pending	TestCorpSub6	Never	No specialist assigned <a href="#">Assign</a>
1/21/2006	Joint Venture	Pending	xxxx	1/21/2006	McSecond, Certspec <a href="#">Change</a>

Figure 51: Assign Specialist Field Open

### 6.3 View Assigned Applications

See section 7.2

### 6.4 Add New Application

See section 7.3

### 6.5 Joint Venture Application

Select Joint Venture Application to display a registration screen as shown below:

### Certification Manager Registration

[? Help](#)

[Log Out](#) Certification Manager

Complete the information below and select **Submit** to create your username and password. Your information is protected by our secure site and will only be used for application purposes. Only one registration is allowed per company. You should **frequently monitor the email address you provide** for important correspondences from the Department of Small and Local Business Development.

<b>Company Information</b> Company Name:* <input type="text"/> Business Phone:* <input type="text"/> - <input type="text"/> - <input type="text"/> Website: <input type="text"/>  <b>Public Contact Information</b> <small>Note: Information below will be displayed on the public website.</small> First Name:* <input type="text"/> Last Name:* <input type="text"/> Phone: <input type="text"/> - <input type="text"/> - <input type="text"/> Ext.: <input type="text"/> Email:* <input type="text"/> Username:* <input type="text"/> Password:* <input type="text"/> <small>(Enter 5 to 25 characters, case-sensitive)</small> Confirm Password:* <input type="text"/>	<b>Business Location Address</b> Address 1:* <input type="text"/> Address 2: <input type="text"/> City:* <input type="text"/> State:* <input type="text" value="District of Columbia"/> Zip Code:* <input type="text"/> - <input type="text"/>  <b>Mailing Address</b> <input type="checkbox"/> Check, if same as Business Location Address Address 1:* <input type="text"/> Address 2: <input type="text"/> City:* <input type="text"/> State:* <input type="text" value="District of Columbia"/> Zip Code:* <input type="text"/> - <input type="text"/>  <input type="button" value="Submit"/>  <input type="button" value="Back"/>
--	---

\*Indicates required fields

Figure 52: Register – Joint Venture Application

You should enter the name of the joint venture in the Company Name field. It should consist of part of the names of both companies involved and include "JV" at the end. Complete the registration and select Submit to bring up the following screen.

<b>Certification Administration</b> <b>Add New Application</b>	<a href="#">? Help</a> <a href="#">Log Out</a> Certification Manager
To begin a new application, select a company and an application type, then select <b>Create Application</b> .	
Search Companies <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>	
Select Company	<div><div>Allied &amp; Smith Brothers - JV</div><div>Allied Fleet Management, Inc.</div><div>Allied Joint Venture (JV)</div><div>Allied Telecom Group, LLC</div></div> <div><input type="button" value="Register New Company"/></div>
<b>Important:</b> Please note that once you create an application, you will not be able to change its type. The type of the application determines the specific information you will have to provide during application entry. If you are not sure which type to choose, please select <a href="#">application help</a> .	
Select Application Type	<input type="text" value="Joint Venture"/>
Assign Certification Specialist	<input type="text" value="Manager, Certification"/>
<div><input type="button" value="Create Application"/> <input type="button" value="Cancel"/></div>	

Figure 53: Add New Application – Joint Venture

3. Select the company name from the Select Company list.
4. Select Joint Venture as the Application Type
5. Select Create Application to bring up the following application screen.

View Application details below. To return to the list of all applications, select **Back to Applications List**.

Enter the application data by completing the steps below. To move between screens, use the **Previous** and **Save & Continue** buttons.

**Step:** 1 Save & Continue >>

Fields marked with an asterisk (\*) are required.

Joint Venture Identifier	JV Dummy FEIN: <input type="text" value="999900045"/>	Joint Venture Name: <input type="text" value="VisionOutsourcing"/>
Certified LSDBE Company	LSDBE Name: <input type="text"/> <span style="border: 1px solid black; padding: 0 5px;">Select</span>	FEIN: <input type="text"/>
Certification Categories	Please select a certified LSDBE first.	
Other Company Name*	<input type="text" value="VisionOutsourcing"/>	
Joint Venture Business Location Address*	Street Address 1: <input type="text" value="4411 Connecticut Ave. NW"/> Street Address 2: <input type="text" value="T-308"/> City: <input type="text" value="Washington"/> State: <input type="text" value="District of Columbia"/> Zip Code: <input type="text" value="20008"/> - <input type="text"/>	
Joint Venture Principal Contact*	First Name: <input type="text" value="Andre"/> Last Name: <input type="text" value="Banks"/> Title: <input type="text"/> Phone: <input type="text" value="202"/> <input type="text" value="723"/> <input type="text" value="4456"/> Email Address: <input type="text" value="test@dc.gov"/>	

Back To Application List Save & Continue >>

Figure 54: Joint Venture Application Details Screen

Enter the "Certified CBE Company" by entering all or part of the company name in the CBE Name field and selecting "Select". Once the company name is filled in, the "Principal Contact" information will be filled in and the "Certification Categories" will update. You may change the Principal Contact information if you desire. Select "Save & Continue" to save the application.

All the items on the Checklist tab of the application must be submitted to DSLBD within fifteen (15) days from your submission date. Please note that in accordance with Title 27 of DCMR Section 812.1(b), "If the application is incomplete or lacks the required verification, it shall be returned to the applicant with a notice indicating the need for the additional actions or materials that are necessary in order for it to be accepted for review". Failure to provide the documents and non-response could result in the closing or denial of the application.

You have successfully completed the LSDBE Joint Venture application.

Once you select the **Submit** button below, you will not be able to change any information that you entered. If you discover an error, contact a Certification Specialist at (202) 727-3900. You may return any time to print the contents of your application or to check on its status.

In addition to submitting the application, you must submit all items noted on the **application checklist** and the notarized **affidavit**\* to the Department of Small and Local Business Development (DSLBD) at the address below. You may return to this site at any time to print the application checklist and affidavit.

You are applying as a Disadvantaged Business Enterprise (DBE). Please complete and submit a **Disadvantaged Business Enterprise (DBE) Form**.\*

Submit your Affidavit and Checklist items to:

Department of Small and Local Business Development  
Attention: Certification Division  
441 4<sup>th</sup> Street, NW, Suite 970N  
Washington, DC 20001  
Phone: (202) 727-3900 Fax: (202) 724-3786

[♦ Print Application Checklist](#) [♦ Print Affidavit\\*](#) [♦ Print DBE Form\\*](#)

\* This document is presented in Portable Document Format (PDF) and a PDF reader is required for viewing.  
[Download a PDF reader](#) or [learn more](#) about PDFs.

<< Go Back Submit Final Application

Figure 55: Submission & Checklist Screen

You can print out any of the needed checklist, affidavits, or forms by selecting any of the links on the screen above. They will open as pdf files in a separate window. Select Submit Final Application to place it in a Pending state.

## 6.6 Generate Reports

Selecting Generate Reports displays the following screen.

**Generate Reports** Log Out Certification Manager

Choose to run the report either by **Company** or **Application**, then select to view **Detailed** or **Summary** report output. Choose **Report Criteria** by clicking on the criteria name or the plus sign. You may also determine what information should be displayed on the report by selecting up to eight columns. To save the search, select the desired criteria, enter Search Name and then press **Save**. To run saved searches, select the search from the **Saved Searches** drop-down and then select **Generate Report** to view and print the report.

**Report By:** ☒ Application ☐ Company 1

**4 Saved Searches:** 4 -- please select saved criteria --

**Select Report Type:** ☒ Detailed ☐ Summary (Totals Only) 2

**Select Report Criteria:** 3

- ☒ Application Type and Status
- ☒ Business Information / Location
- ☒ Services/NIGP Codes
- ☒ Principal Owner

**Customize your report output - select up to eight (8) columns:**

<input type="checkbox"/> Address/Phone	<input checked="" type="checkbox"/> Application Status	<input checked="" type="checkbox"/> Application Type	<input type="checkbox"/> Assigned Specialist	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">5</span> <input type="checkbox"/> Business Structure
<input checked="" type="checkbox"/> CBE#	<input type="checkbox"/> Certification Categories	<input type="checkbox"/> Company Status	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Email Address (Principal Contact)
<input checked="" type="checkbox"/> Expiration Date	<input type="checkbox"/> FEIN	<input type="checkbox"/> Industry Groups	<input type="checkbox"/> NIGP Codes	<input type="checkbox"/> Owners
<input type="checkbox"/> Primary Business Services	<input type="checkbox"/> Principal Owner's Citizenship	<input type="checkbox"/> Principal Owner's Gender	<input type="checkbox"/> Principal Owner's Name	<input type="checkbox"/> Principal Owner's Race
<input type="checkbox"/> Principal Contact Name/Phone	<input type="checkbox"/> Revenue (Average 3 years)	<input type="checkbox"/> Status Date	<input type="checkbox"/> Trade Divisions	<input type="checkbox"/> Quadrant
<input type="checkbox"/> Ward	<input type="checkbox"/> Zip Code	<input type="checkbox"/> # of Site Visits		

Figure 56: Generate Reports Screen

1. Select **Report By**: Application or Company.
2. Select **Report Type**: Detailed or Summary (Totals Only). Detailed is the default selection when you first access this screen.
3. Select the desired **Report Criteria** from the following groups:
  - Application Type and Status
  - Business Information/Location
  - Services/NIGP Codes
  - Principal Owner

Selecting the plus (+) sign next to each group will open selection criteria fields for that group. (as illustrated on the screenshot below for Application Type and Status)

Report By: ☐ Application ☒ Company

Saved Searches: -- please select saved criteria --

Select Report Type: ☒ Detailed ☐ Summary (Totals Only)

Select Report Criteria:

**Application Type and Status**

Select criteria to view information for all company applications or by the company certification status. You may also view applications that expire in the selected date range or by the specific status assigned date.

☒ Range ?  
☐ Snapshot ?  
☐ Daily Snapshot ?

Company Status: Active

Application Type: All  
 Certification  
 Joint Venture  
 Recertification

Assigned Specialist: All  
 Alle, Yvonne  
 Beasley, Corey  
 BeasleyM, Corey

Expiration Date Range: -- select dates --

Status From Date: 01/01/1900

Status To Date: 3/5/2009

**Business Information / Location**  
**Services/NIGP Codes**  
**Principal Owner**

Customize your report output - select up to eight (8) columns:

<input type="checkbox"/> Address/Phone	<input checked="" type="checkbox"/> Application Status	<input checked="" type="checkbox"/> Application Type	<input type="checkbox"/> Assigned Specialist	<input type="checkbox"/> Business Structure
<input checked="" type="checkbox"/> CBE#	<input type="checkbox"/> Certification Categories	<input type="checkbox"/> Company Status	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Email Address (Public Contact)
<input checked="" type="checkbox"/> Expiration Date	<input type="checkbox"/> FEIN	<input type="checkbox"/> Industry Groups	<input type="checkbox"/> NIGP Codes	<input type="checkbox"/> Owners
<input type="checkbox"/> Primary Business Services	<input type="checkbox"/> Principal Owner's Citizenship	<input type="checkbox"/> Principal Owner's Gender	<input type="checkbox"/> Principal Owner's Name	<input type="checkbox"/> Principal Owner's Race
<input type="checkbox"/> Public Contact Name/Phone	<input type="checkbox"/> Revenue (Average 3 years)	<input type="checkbox"/> Status Date	<input type="checkbox"/> Trade Divisions	<input type="checkbox"/> Quadrant

Figure 57: Company Report-Application Type and Status

You may select criteria in only one or in all four groups. If you do not make any selections, i.e. leave "ALL" as a default criteria in each group, report will display all the records in the database.

For a Company Report you may select one of the three options to run a company report within a specific timeframe:

- **Range-** allows you to run a "From-To" date range company report.
  - **Snapshot-** allows you to run a one day company report.
  - **Daily Snapshot-** allows you run a trend line report calculated for each day within the chosen date range.
6. **Enter Search Name** box allows you to save your selected search criteria for future re-runs. Enter the Search Name and then select Save. Newly saved search will appear in the **Saved Searches** drop-down at the top of the page.
  7. **Customize your report output** box will only be shown if **Detailed** Report Type is selected. You may choose what information will be displayed on the report based on the chosen criteria by selecting up to eight (8) report columns.

The following columns are pre-selected on the screen: Application Status, Application Type, CBE #, Company Name, and Expiration Date. You may de-select these columns and choose different ones for your report. For example, if your criteria is all the "Certification" applications that are "Pending", you may choose to see such information on the report as Company Name, CBE #, Assigned Specialist, Status Date and Public Contact Name/Phone.

If **Summary** Report Type is selected, **Select Group By** options box will be displayed on the screen.

Figure 58: Select Group By options for Summary Report Type

On your summary report, you may view three levels of totals. You must select at least one level – Group By Level 1. When level 1 is selected, you may select Group By Level 2 and then Group By Level 3. For example, your selection criteria is all “Certification” applications. For the group by options, you may choose the following:

- Group By Level 1 – Application Type
- Group By Level 2 – Application Status
- Group By Level 3 – Gender (principal owner’s gender)

Report output will then show three levels of totals:

- By Application Type (Total # of Certification applications)
- By Application Status (Total # of Certification applications for each status, i.e. Pending, Approved, Denied, etc.)
- By Gender (Total # of Certification applications with female and male principal owner)

8. Select “Generate Report” button to view the report. A sample detailed report is shown below.

(this control box will not be printed)				
<a href="#">print entire report</a> <a href="#">close window</a>				
<b>Results for the following Report Criteria:</b> Application Type: <b>Certification</b> Application Status: <b>Approved</b> Expiration Date Range: <b>in 90 days</b> Zip Code: <b>20005</b>				
Tuesday, September 18, 2007				<b>Total # of Records: 8</b>
Application Status	Application Type	CBE#	Company Name	Expiration Date
Approved	Certification	LSZR 10200715654	Park USA, Inc.	10/20/2007
Approved	Certification	LS 11200716270	Yellow House Associates, LLC	11/08/2007
Approved	Certification	LSD 09200716498	Liberated Marketing & Communications, LLC	09/28/2007
Approved	Certification	LSD 10200716529	Hardie Industries, Inc.	10/20/2007
Approved	Certification	LS 09200716546	Levine & Associates, Inc.	09/28/2007
Approved	Certification	LS 09200716591	Bilingual Temps, LLC d.b.a. Multilingual Experts Interpreters & Translators	09/28/2007
Approved	Certification	LSDZR 09200716612	Inner city Development, LLC	09/28/2007
Approved	Certification	LSD 11200716631	Proxy Personnel, LLC	11/08/2007

Figure 59: Detailed Report

Criteria selected for the report is shown at the top of the page followed by the current date and total # of records found.

Select “close window” to return to the selection criteria screen. Select “print entire report” to pop-up a print dialog window. For your ease of reading, you may wish to set your printer preferences or options to print this report in a landscape view. You should already have a printer set as your default printer in order to do this. The following figure depicts one type of printer window that you may see. The actual window you see depends on your network configuration, printer, and what versions of software are running on your computer and printer. Select the “Print” button to send the report to the printer.

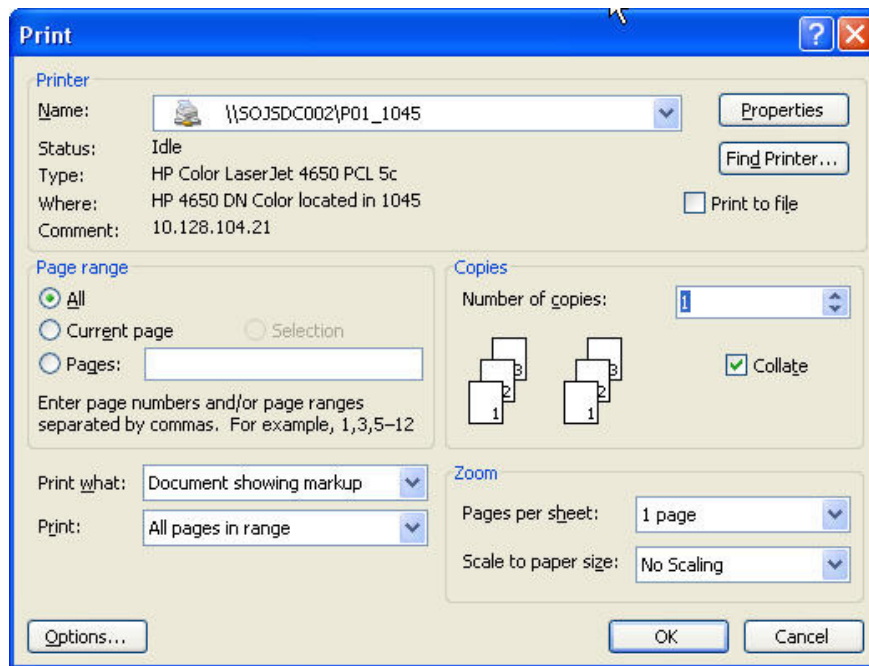


Figure 60: Print Window (your window may be different)

## 6.7 Update FEIN

Select Update FEIN to display the following screen where you can change the FEIN for a company.



**Certification Administration**  
**Update FEIN** [Log Out Certification Manager](#)

Search for a specific company by name and update its FEIN.

Find a Company

Select Company 

14th Street Tailors  
1st Choice Staffing Agency.com  
2020 Company, LLC  
2Pi Solutions, Inc.

Figure 61: Update FEIN Screen

To update an FEIN:

1. Select the desired company from the "Select Company" list or enter all or part of a company's name in the "Find a Company" field and select "Search". If there are several companies with all or part of the name you entered, they will be shown in the "Select Company" list.
2. Once you have selected a company, the screen will update and display the "Current FEIN" for the company and a field where you can enter the "New FEIN".

**DC Intranet** Help [Log Out Certification Manager](#)

**Certification Administration**  
**Update FEIN**

Search for a specific company by name and update its FEIN.

Find a Company

Select Company 

14th Street Tailors  
1st Choice Investment Group, LLC  
1st Choice Staffing Agency.com  
2020 Company, LLC

**Update Company's FEIN Number**

Current FEIN:	<input type="text" value="579252913 (from company profile)"/>
New FEIN:	<input type="text" value="579252913"/>

Figure 62: Company Selected for FEIN Update

3. Select the "Update FEIN" button to make the change. A popup window will ask you if you are sure you want to change the FEIN. Select "OK" to make the change, select "Cancel" to close the popup without making any changes to the record.



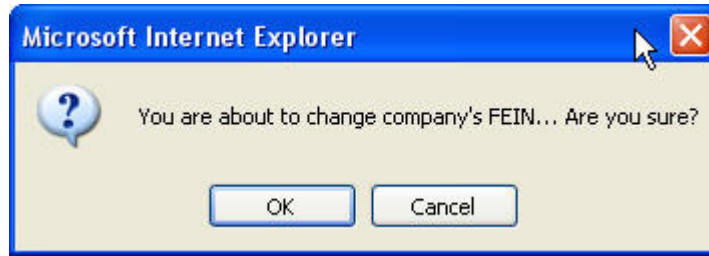



Figure 63: Update FEIN Confirmation Popup Window

4. After the change has been made, you will see an entry in the "History" window by selecting the History icon . The old FEIN and the new FEIN will be displayed along with your username and the date and time the change was made.

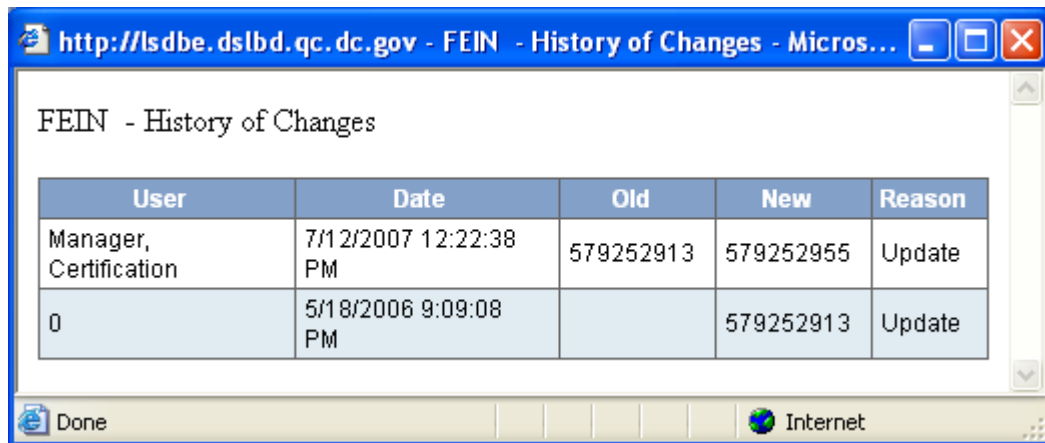


Figure 64: History of Changes Popup Window

5. Use the "Back" button to return to the previous screen when you are done.

## 6.8 View/Print Company Information

See Section 7.5

## 6.9 Update Company Information

Selecting Update Company Information displays the following screen.

**Certification Administration****Update Company Information**[? Help](#)[Log Out](#) Certification Manager

Enter criteria below to search for a specific company by Company Name or FEIN. To view or edit current company information, select **Update** in the View/Edit column below. Note: You can view/edit information for active CBE's only. Companies that are undergoing a Certification process will not be displayed.

Showing: 1-10 of 969      Page 1 of 97    1 2 3 4 5 6 7 8 9 10 [11+]

Company	View/Edit	FEIN #
Jones Electric Company, Inc.	<a href="#">Update</a>	521265815
F. S. Taylor & Associates, P.C.	<a href="#">Update...</a>	521196225
Jones & Wood, Inc.	<a href="#">Update...</a>	521146004
Corporate Systems Resources, Inc.	<a href="#">Update...</a>	521252548
Independence Federal Savings Bank	<a href="#">Update...</a>	520883392
Dynamic Concepts, Inc.	<a href="#">Update...</a>	521153049
Nutrition, Inc.	<a href="#">Update...</a>	521127124
James E. Newell Decorators	<a href="#">Update...</a>	520823137
Ewing Capital, Inc.	<a href="#">Update...</a>	521230511
Delon Hampton & Associates, Chartered	<a href="#">Update...</a>	520968507

Figure 65: Update Company Information - Search Screen

1. Enter a CBE's Company Name or FEIN into one of the fields. If you want to use the search feature, enter the first few letters of a company's name in the "CBE Company Name" field and select the "Search" button.

You can update information for all the active (not expired) CBE companies. Selecting the "Update" link in the table displays the following screen.

**Certification Administration**

**Update Company Information - Kalos Construction Company, Inc.**


Update information for a company below. To save changes, select **Save Changes**. To return to the list of all companies, select **Back to Company List**.

Fields marked with an asterisk (\*) are required.

Business Name	<input type="text" value="Kalos Construction Company, Inc."/>		
Certification Category* (Choose all that apply)	<input checked="" type="checkbox"/> Local Business Enterprise (LBE) <input checked="" type="checkbox"/> Small Business Enterprise (SBE) <input type="checkbox"/> Disadvantaged Business Enterprise (DBE) <input type="checkbox"/> Development Enterprise Zone (DZE) <input type="checkbox"/> Longtime Resident Business (LRB) <input type="checkbox"/> Resident Owned Business (ROB)		
Current CBE Number	<input type="text" value="LS00440032009"/>	Expiration Date	<input type="text" value="3/1/2009"/> <input type="checkbox"/> Terminate
Business Structure*	<input checked="" type="radio"/> Corporation <input type="radio"/> Limited Liability Corporation <input type="radio"/> Partnership <input type="radio"/> Sole Proprietorship		
Business Established*	Date Business Established: <input type="text" value="10"/> / <input type="text" value="01"/> / <input type="text" value="1985"/> Location of Incorporation: <input type="text"/>		
Other Business Identifiers*	Dun & Bradstreet No.* <input type="text"/> Local Unemployment Compensation No.* <input type="text"/> <small>Contact (800) 333-0505 for assistance      Contact (202) 698-7550 for assistance</small>		
Describe the business primary line, trade, or service.* (1000 characters maximum)	<input type="text"/>		

Figure 66: Update Company Information – Business Info tab

2. The name of the company that you selected is shown at the top of the page.

3. You may update company information by selecting one of the available tabs: Business Info, Location/Contacts, Services/NIGP Codes, Owners, Board of Directors, Officers and Notes.
4. **Current CBE Number** and **Expiration Date** on Business Info tab are read-only fields. CBE Number will change if Certification Categories are modified. Expiration Date will not change.
5. You may view the history of changes for any field by selecting the History icon  next to the field name.
6. If you have made changes or added information, be sure to select the “Save Changes” button before leaving the page. Select “Reset” to reverse all the changes.
7. Changes made via the Update Company Information function will not update information in any of the applications submitted by the company.
8. Select “Back To Company List” to return to the Search Screen.

## 6.10 Create Mail Merge Data File

Selecting Create Letters and Mail Merge Data File will display the following screen:



Figure 67: Create Letters and Mail Merge Data File Screen

The entire process has been explained in detail, including using Microsoft Word to generate labels and letters, in the Mail Merge User Guide (accessible from the Help link on the screen above). You should refer to this manual for all the details on using the Mail Merge feature.

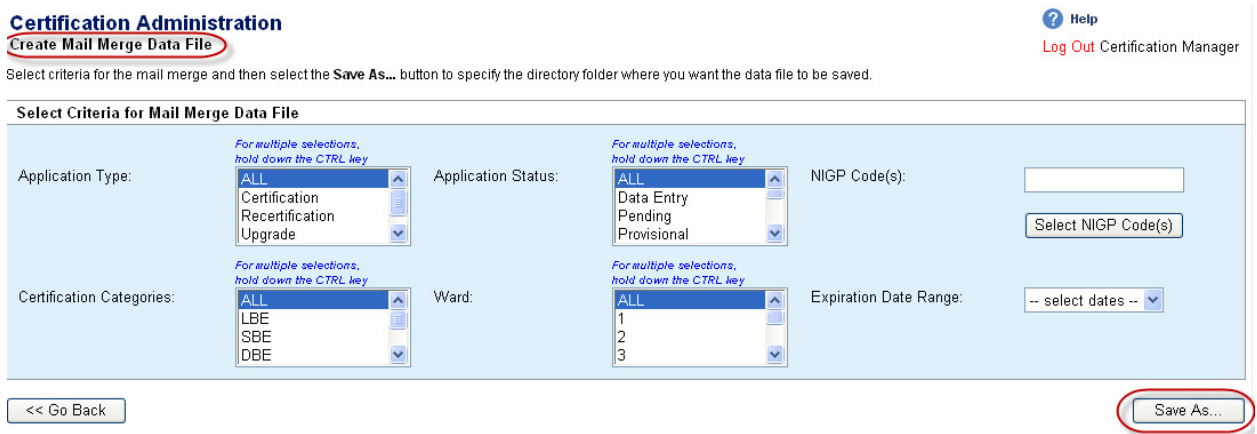


Figure 68: Create Mail Merge Data File

This section will only explain how to create the mail merge data file that will be used in Microsoft Word.

Select the "Save As..." button and the File Download popup appears.

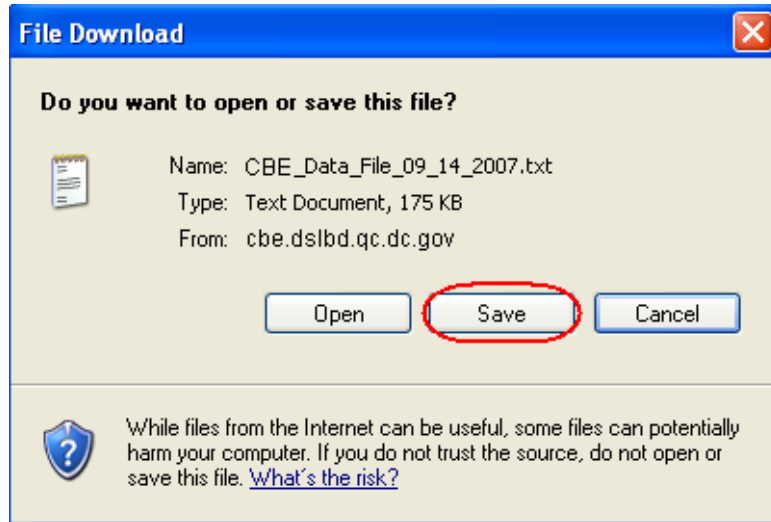


Figure 69: File Download Popup

Select "Save" to bring up the following screen where you will need to specify where to place the mail merge file.

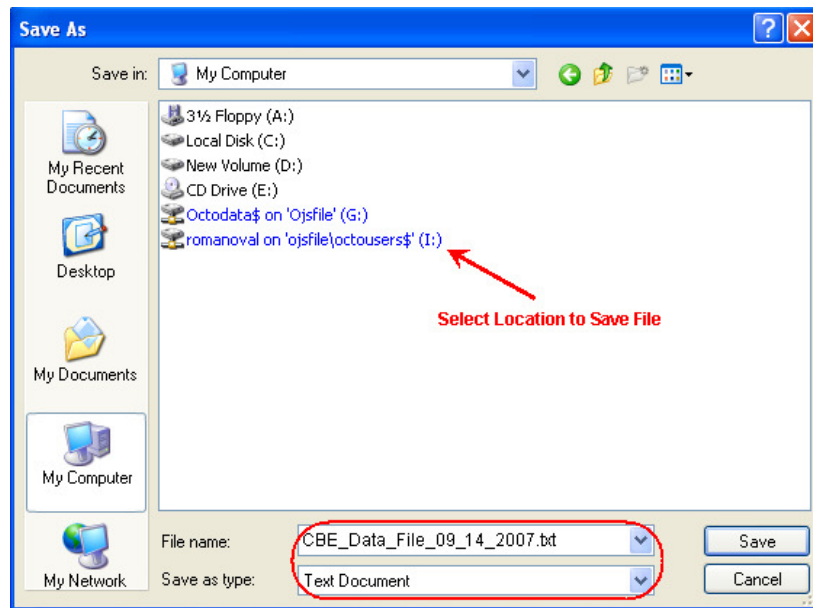


Figure 70: Save As Dialog Box

The system defaults the data file name to CBE\_Data\_File\_(current date) but you may rename it and choose where on your local or network drives to save the file.



You **must** select the "Save as type" to be Text Document (\*.txt)

Select the "Save" button on the Save As dialog box to create the data file. Once the file has been created and saved, a message appears stating, that the save was successful. You may "Close" the popup window.

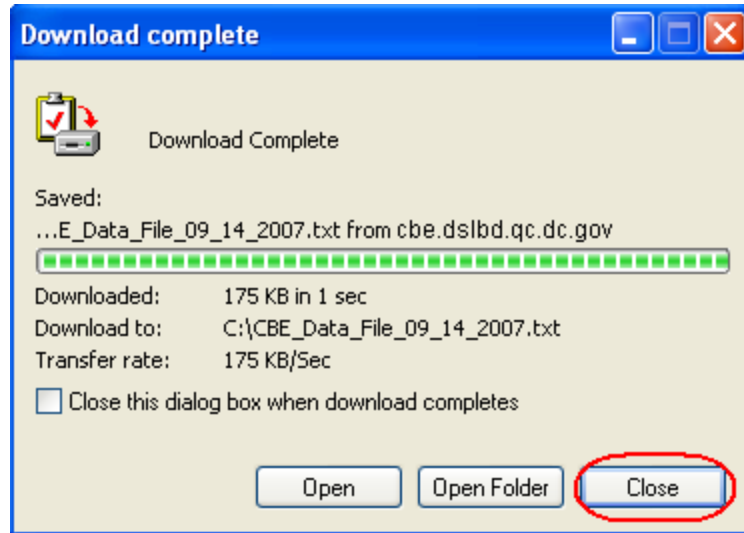


Figure 71: Download Complete Popup Window

## 7 Certification Specialist

### 7.1 Certification Specialist Administration

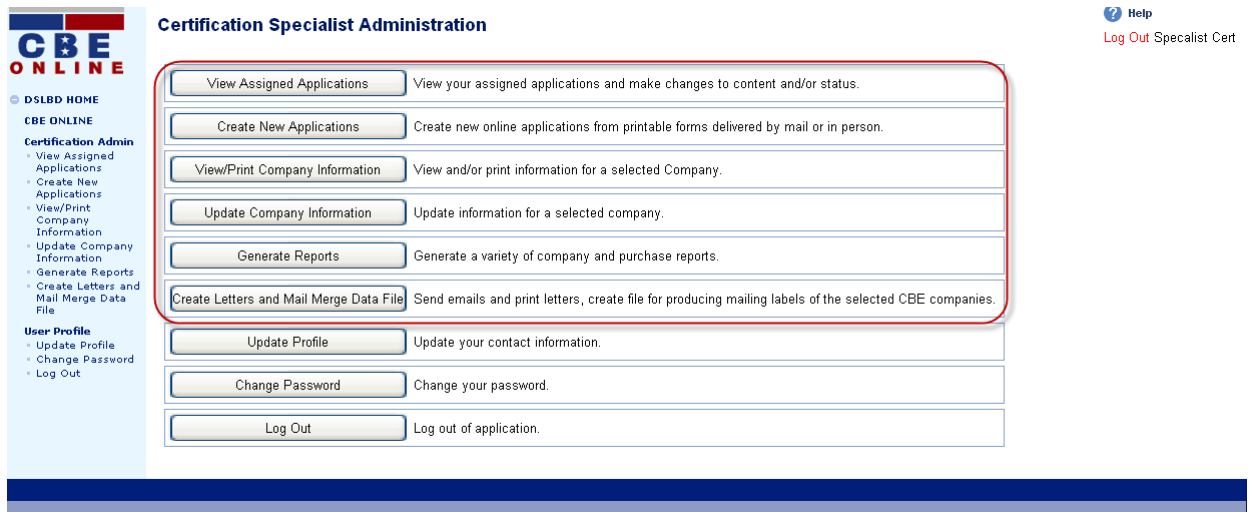


Figure 72: Certification Specialist Administration Screen

### 7.2 View Assigned Applications

Selecting “View Assigned Applications” displays the following screen.

**Certification Administration****View Assigned Applications**[? Help](#)[Log Out](#) [Specialist C](#)

Enter criteria below to search through the current applications. To view or edit an application, select **Details** in the View/Edit column below. To add a new application, select **Create New Application**.

[Create New Application](#)

Company:  Specialist: Roy, Yolanda   
 App Type: Certification  Status: -- all statuses --

Showing: 1-10 of 800 Page 1 of 80 [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [\[11+\]](#)

Date Submitted	App Type	Status	Company	View/Edit	CBE#
2/18/2009	Certification	Pending	WATCHMAN PROTECTIVE SERVICES, INC.	<a href="#">Details...</a>	Number not assigned
2/18/2009	Certification	Pending	Woodland Safety	<a href="#">Details...</a>	Number not assigned
2/18/2009	Certification	Pending	T & G Cleaning and Landscaping, LLC	<a href="#">Details...</a>	Number not assigned
2/17/2009	Certification	Pending	PIRAAS Publishing	<a href="#">Details...</a>	Number not assigned
2/17/2009	Certification	Pending	Amber Solution, LLC	<a href="#">Details...</a>	Number not assigned
2/15/2009	Certification	Pending	GVL & Associates	<a href="#">Details...</a>	Number not assigned
2/13/2009	Certification	Pending	Square 134 Architects	<a href="#">Details...</a>	Number not assigned
2/13/2009	Certification	Pending	Tishman Construction Corporation of DC	<a href="#">Details...</a>	Number not assigned
2/12/2009	Certification	Pending	CDKM Consulting, LLC	<a href="#">Details...</a>	Number not assigned
2/12/2009	Certification	Pending	KCM-DC Inc	<a href="#">Details...</a>	Number not assigned

[<< Go Back](#)

Figure 73: View Assigned Applications

- To narrow down the display, enter information into any or all of the fields as desired. If you enter multiple fields, the system will display only those results that match all entered criteria. Search criteria includes:

**Company**—enter a company name in the field. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

**Specialist**—Select a specialist from the drop-down list, all applications assigned to this specialist will be displayed. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

**App Type**—Select a specific application type to display. Types available are: Certification, Joint Venture, Recertification, Upgrade or All. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

**Status**—Select a specific application status to be displayed. Status types are: Data Entry, Application Submitted, Intake Review, Specialist Review, Manager Review, Approved, Denied, Held in Abeyance, Provisional, Referred to SLBOC, , Returned, Closed, Deficient or Withdrawn. If this is the only criteria you want to see, select the “Search” button, and the results will be displayed in the table below. If you want to enter other criteria, you may do so before selecting the “Search” button.

Select the “Reset” button to clear all search fields. All results that meet your search criteria will be displayed. Selecting a column heading allows you to display the entire table, sorted by the selected column heading. Selecting the heading one time will

display that column in an ascending order (A to Z); selecting it a second time will sort in a descending order (Z to A).

2. Select “Details” in the desired row to view a specific application. The screen displays the application for the company.

Application Data Checklist Tracking Details Status 1

Step: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 2

Review checklist items Reset Save & Continue >>

Fields marked with an asterisk (\*) are required.

Indicate the CBE status for which you are applying\* (Choose all that apply. At least one must be selected)

☒ Local Business Enterprise (LBE) ☒ Small Business Enterprise (SBE)  
☒ Disadvantaged Business Enterprise (DBE) ☐ Development Enterprise Zone (DZE)  
☐ Longtime Resident Business (LRB) ☐ Resident Owned Business (ROB)

Business Structure\* ☒ Corporation ☐ Limited Liability Corporation ☐ Partnership ☐ Sole Proprietorship

Business Identifier\* Federal Employer ID (FEIN) 770620315 Business Name: WATCHMAN PROTECTIVE SERVICE

Business Location Address\* Street Address 1: 1025 CONNECTICUT AVENUE Street Address 2: Suite 1000  
City: WASHINGTON State: District of Columbia Zip Code: 20036 -

Business Contact Information Business Phone: 202 558 0238 Business Fax: 301 358 3006  
Business Email Address: test@dc.gov Business Website Address: www.watchmanprotective.

Principal Contact\* First Name: Sylvester Last Name: Okere  
Title: Owner CEO  
Phone: 301 302 1771 Email Address: test@dc.gov

Secondary Contact First Name: Karen Last Name: Braxton  
Title: Manager  
Phone: 410 608 3303 Email Address: kbraxton@watchmanprote.

Back To Application List Review checklist items Reset Save & Continue >> 3

Figure 74: View Assigned Application—Details Selected For an Application in List

1. There are four tabs at the top of the application you may select: Application Data, Checklist, Tracking Details and Status.
2. You should review the application as per your normal business procedures. Use the Step boxes at the top to review the applications page by page. If the application you are updating has not been completed, some boxes will be gray (or if that particular step is not applicable).
3. If you have made changes or added information, be sure to select the “Save & Continue” button before leaving the page.



Application Data	Checklist	Tracking Details	Status
Checklist Item			
DBE Form*			
DBE Narrative Letter (on letterhead, signed and dated)			
Submit personal District or state and federal tax returns for the last year (signed)			
Verification from the Enterprise Zone Finder Map (please verify at <a href="http://dslbd.dc.gov">http://dslbd.dc.gov</a> )			
Residential lease or deed			
Proof of residency of principal owner(s) (e.g. copy of driver's license or DMV picture ID and copy of current residential utility bill or voter registration card)			
Affidavit*			
Current financial statement - Balance Sheet, Profit and Loss Statement, and Fixed Asset Inventory (no older than 90 days)			
District or state and federal tax returns, last two years, and all schedules (signed)			
Business, professional and/or trade licenses			
Most recent Certificate of Good Standing issued by Office of Tax and Revenue			
Most recent Certificate of Good Standing issued by Department of Consumer and Regulatory Affairs			
Most recent Form UC-30 (Employer's Quarterly Contribution and Wage Report) (if applicable)			
Lease or deed for business site (signed)			
List of Current Employees (including name and home address for each employee)			

Back to Application List      With selected items:      Update Date Received      or      Clear Date Received

Figure 75: View Assigned Application—Checklist Tab

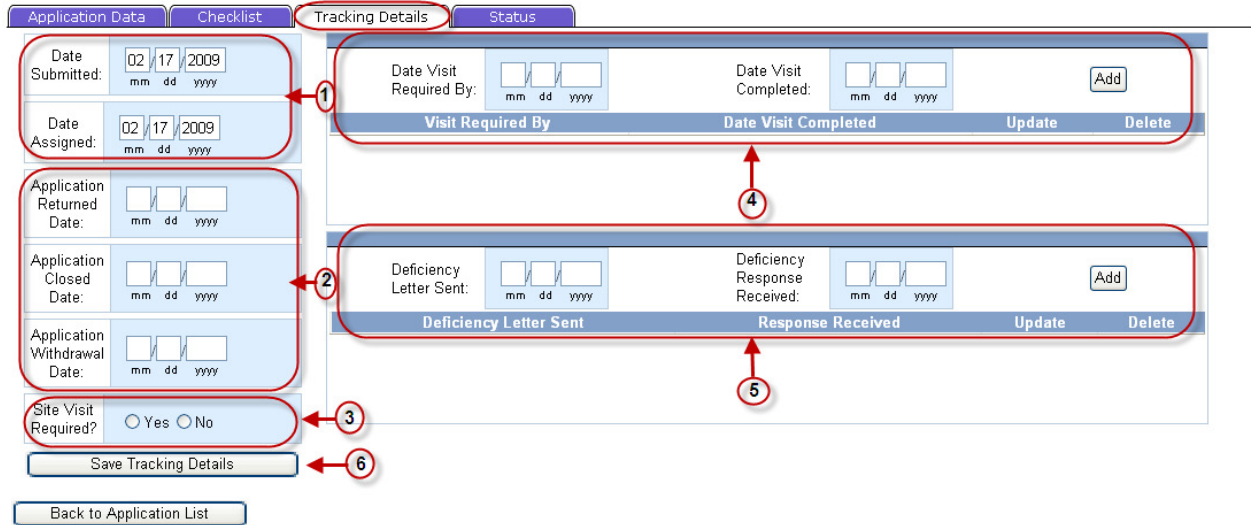
1. When a company returns the required documentation to DSLBD to complete the application, enter the date the item was received in the date fields at the end of each row. Select Update each time you enter a date. The company will see this information when logging in and checking its application status.
2. The Certification Specialist will mark a checklist item N/A or enter the date the checklist item was received at the bottom of the screen. The date will auto-populate in the “Date Received” column.

**CBE Business Online**

Application Details Screen - Ginicorp dba JE Technologies - Recertification, Pending

  Help  
 Print [Log Out](#) [Specialist Cert](#)



View tracking details information for the current application. If site visit is required, enter applicable site visit dates. You may upload documentation for each site visit. To save tracking details information, select **Save Tracking Details**. To return to the list of all applications, select **Back to Application List**.





The screenshot shows the 'Tracking Details' tab selected. The left sidebar contains the following fields:

- Date Submitted:** 02/17/2009
- Date Assigned:** 02/17/2009
- Application Returned Date:** (empty)
- Application Closed Date:** (empty)
- Application Withdrawal Date:** (empty)
- Site Visit Required?** ☐ Yes ☐ No
- Save Tracking Details** button
- Back to Application List** button

The main area contains two tables:

Visit Required By	Date Visit Completed	Update	Delete
<input type="text"/>	<input type="text"/>		






Deficiency Letter Sent	Response Received	Update	Delete
<input type="text"/>	<input type="text"/>		

Red circles and arrows highlight the following elements:

- 1: Date Submitted and Date Assigned fields
- 2: Application Returned Date, Application Closed Date, and Application Withdrawal Date fields
- 3: Site Visit Required? radio buttons
- 4: Date Visit Required By and Date Visit Completed fields in the first table
- 5: Deficiency Letter Sent and Response Received fields in the second table
- 6: Save Tracking Details button

Figure 76: View Assigned Application—Tracking Details Tab

Tracking Details tab displays tracking details information related to the activities associated with the current application.

4. **Date Submitted** shows the date an application was submitted. **Date Assigned** shows the date when a Certification Manager assigned a specialist to the application. Both dates are populated by the system and cannot be changed.
5. Enter information concerning various actions for the application, such as the **Application Returned Date**, **Application Received Date**, and **Application Withdrawal Date**.
6. If a site visit is required for the application, select 'Yes' or, select 'No' if site visit is not required. If you select 'Yes', you can enter dates for when the visit is required and when it was completed on the right side of the screen.
7. Enter **Date Visit Required By** and select the Add button to add site visit information into the table. After the visit was conducted, update this visit by selecting the Update icon  and enter **Date Visit Completed**. You can enter multiple site visits and all of them will be displayed in the table. To delete visit, select the Delete icon  in the table for a specific visit. You can also attach site visit document to each site visit by selecting the Upload icon .
8. Enter **Deficiency Letter Sent** date and select the Add button to add the date into the table. After the response is received, update the entry in the table by selecting the Update icon  and enter **Deficiency Response Received** date. You can enter multiple dates and all will be displayed in the table. To delete table entries, select the Delete icon  in the table.
9. Select "Save Tracking Details" to save the information.

**Certification Specialist**

**UPLOAD SITE VISIT DOCUMENTS**

1 → for site visit required by: 5/15/2007, Details International

Use the Browse button to select a file: C:\OCTON\Project Docs\Company\Pha Browse... 2

**NOTE:** Document size limit is 5 MB

Save Document As: Financial Information Upload 3

Document Name	Date Added	
Company Services Description	05/10/2007	X 4
Expense Summary	05/10/2007	X

Return to Tracking Details 5

Figure 77: View Assigned Application—Tracking Details Tab – Upload Site Visit Documents Page

Upload Site Visit Documents page opens from the Tracking Details tab, when upload icon is selected for a specific site visit.

1. Site Visit date for which the documents can be upload displays at the top of the page along with the Company Name. You may select a different site visit date from the Tracking Details tab.
2. Select “Browse” to locate the file you want to upload from the network or your local drive.
3. Enter the file name as you want it to appear on the screen in the “Save Document As” box and select “Upload”.
4. All the files uploaded for the selected site visit are displayed on the screen. You can view each documents by selecting the Document Name. To delete uploaded document, select the Delete icon X.
5. To return to the Tracking Details tab, select “Return to Tracking Details”.

Figure 78: View Assigned Application—Status Tab

Use the Status tab to change the status of the application, recommend certification categories and NIGP Codes for Approval and review history of changes.

- Once an application is approved, **Approval Date**, **Expiration Date** and **CBE #** will be assigned automatically.
- CBE Analysis Report** link opens an 8-page report that allows you to provide information gathered during company's site visit. It summarizes investigative research used to make recommendations to the SLBOC.
- When an application status is changed to "provisional", **Provisional Approval Date**, **Provisional Expiration Date** and **Provisional CBE #** will be assigned automatically and displayed on the screen.
- The Specialist will select a **Recommendation** from the dropdown selections: Approval Recommended, Denial Recommended or Split Decision. Once the recommendation has been chosen the application status will automatically change to "Manager Review".
- You may provide your recommendation whether to approve requested **certification categories**. De-select categories that you do not recommend for approval. This will not change requested categories in the application. If current application is a Recertification or an Upgrade, and new categories are added that did not exist in the previously approved application, those new categories will be shown in **blue** color. If previously existing categories were removed, they will be shown in **bold**.

6. You may provide your recommendation whether to approve requested **NIGP Codes**. Select “Edit NIGP Code(s) button to remove NIGP Codes that you do not recommend for approval. This will not change requested NIGP Codes in the application. If current application is a Recertification or an Upgrade, and new NIGP Codes are added that did not exist in the previously approved application, those new codes will be shown in **blue** color.
7. Enter the **Specialist Comments** in this area. Select “Save Recommendation” to keep the information or “Reset” to clear the fields. Newly added comments will be shown in the **Specialist Comments History** table on the right side of the screen.
8. Select a new status from the **Smart drop-down** list and then select “Save Changes.” The Smart drop-down will only display statuses that are available according to the system logic.

The application statuses are:

**Data Entry:** When a user is entering an application online and filling out the application the status is “*Data Entry*”.

**Application Submitted:** If an application has been submitted to DSLBD for processing ,but the supporting documents have not been received, the application is deemed to be in “*Application Submitted*” status.

**Intake Review:** Once the applicant submits supplemental documentation the time starts for the DSLBD Specialist. The benchmark for the Certification Specialist is 45 business days. The time starts from the earliest date entered for a checklist item. Once the Specialist enters one document into the checklist, the status will automatically be changed to “*Intake Review*”.

Once the Specialist enters one document into the checklist, the **external** status will automatically be changed to “*Under Review*”.

**Specialist Review:** If a Certification Specialist is currently processing an application to determine its completeness, the application is deemed to be in “*Specialist Review*” status. Once **all** of the documentation is received and entered into the checklist the status will automatically be changed to “*Specialist Review*”.

If a Certification Specialist is currently processing an application to determine its completeness, the application **external** status will be “*Under Review*”.

**Manager Review:** As soon as the specialist makes a recommendation within the status tab under the recommendation dropdown (approval recommended, denial recommended or split decision) the status is automatically changed to “*Manager Review*”.

If a Certification Specialist has completed processing an application and has prepared an analysis review by the Certification Manager, the application **external** status will be “*Final Review*”.

**Deficient:** If the Specialist is currently processing an application and the application is missing information necessary to process the application, the application is deemed “*Deficient*”. Upon receipt of the deficient document the application is changed back to “*Specialist Review*”.

**Held in Abeyance-** In some cases the application can be presented for determination and deemed “*Held in Abeyance*”, until the documentation is received. This application acts as approved and will obtain a CBE #, but will not be published to the website. A new CBE # will be generated for a cert and recert application and displayed on the status tab page, but not added to the master table. The CBE # will only be viewable on the status tab section “CBE #”. An Upgrade application will retain the same CBE # from the previous application in the system, the application will not generate a new CBE # for an Upgrade application until approved.

**Provisional:** The “Provisional” status is for the commission to give approval for an application. DSLBD never uses this status anymore since the commission is not part of the process anymore, but this status option will remain active.

**Referred to SLBOC:** The “Referred to SLBOC” status is for the commission to give approval for an application. DSLBD never uses this status anymore since the commission is not part of the process anymore, but this status option will remain active.

**Final Statuses:** The final statuses are Approved, Closed, Withdrawn, Denied and Returned.

9. The **Status History** lists all statuses the application has had, who performed the change and the date it was effective.
10. The **Application History** lists all applications the company has, their status and date of submission.

### 7.3 Add New Application

Applications are entered into CBE online. These applications must be entered into the system so the information gets into the database. Select “Create New Application” from the Administration screen.

**Certification Administration**  
**Add New Application**

To begin a new application, select a company and an application type, then select **Create Application**.

Search Companies

Select Company

- 1 Magination Consulting International
- 1-800 Junk-USA
- 14th Street Tailors

**Important:** Please note that once you create an application, you will not be able to change its type. The type of the application determines the specific information you will have to provide during application entry. If you are not sure which type to choose, please select [application help](#).

Assign Certification Specialist

Figure 79: Add New Application Screen

To add an application, first you must check to see if the company is in the database. Enter the company name or part of the name in the “Search Companies” field; if any companies in the database match the search criteria entered, they are displayed in the “Select Company” field. Select a company.

If the company is not in the database, you must first register the company before you can add a new application. Register a new company by selecting the “Register New Company” button.

**CBE Online**  
**Registration**

Complete the information below and select **Submit** to create your username and password. Your information is protected by our secure site and will only be used for application purposes. Only one registration is allowed per company. You should **frequently monitor the email address you provide** for important correspondences from the Department of Small and Local Business Development.

**Company Information**

Company Name:

FEIN/SSN Number:

Business Phone:  -  -  For internal OSLEBD use only

Website:

**Public Contact Information**

Note: Information below will be displayed on the public website.

First Name:

Last Name:

Phone:  -  -  Ext.:

Email:

Username:

Password:

(Enter 5 to 25 characters, case-sensitive)

Confirm Password:

**Business Location Address**

Address 1:

Address 2:

City:

State:

Zip Code:  -

**Mailing Address** Check, if same as Business Location Address ☐

Address 1:

Address 2:

City:

State:

Zip Code:  -

\*Indicates required fields

Figure 80: Company Registration Screen

Enter the following information in the Company Information section:

- Company Name – The full name of the company
- FEIN/SSN Number – This is the tax identification number that goes on company's income tax forms it may be the Social Security Number as well. This 9-digit number is generally issued by the IRS.

- Business Phone – The phone number for the company
- Website – Provide the URL for the company's website if applicable

Enter the name of a person in the company who is the contact that DSLBD interfaces with:

- First Name
- Last Name
- Phone—Enter a number where this person can be reached.
- Email—Enter an email address where DSLBD can send messages; this should be one that is used frequently.
- Username—Enter a username that you will easily remember.
- Password—Enter a password that you will easily remember, the password must be between 5 and 25 characters and is case sensitive.
- Confirm Password—Enter the same password that you entered above.

Enter the Business Location Address for the company:

- Provide the **Business Location Address** of the company. According to the DC Law, in order to be certified as a CBE, the company's principal office must be physically located in DC.

Enter the Mailing Address for the company:

- Provide the **Mailing Address** of the company if it is different from the Business Location Address. If the address is the same, select the checkbox to pre-populate address information.

Select "Submit" to enter the company into the system. An email will be sent to the company providing them with the username and password you entered.

Select the "Create New Application" link on the left navigation bar to return to the Add New Application screen.

**Certification Administration**  
Add New Application

To begin a new application, select a company and an application type, then select **Create Application**.

Search Companies

Select Company

- Magination Consulting International
- 1
- 1-800 Junk-USA
- 14th Street Tailors

**Important:** Please note that once you create an application, you will not be able to change its type. The type of the application determines the specific information you will have to provide during application entry. If you are not sure which type to choose, please select [application help](#).

Assign Certification Specialist

Figure 81: Add New Application Screen



1. Select the company from the “Select Company” list.
2. Using the drop-down list in the “Select Application Type” field. Application types are Certification, Joint Venture, Recertification, and Upgrade. The system will determine what application types are available to select. If the company is doing business with another company and that company is certified, you can select the Joint Venture application. The system will not allow a new application to be created if there is already one in process in the system.
3. Select “Create Application” when all appropriate information has been selected. Select “Cancel” to leave the screen without performing any functions.



The Application types available will vary depending on what applications are already in the system if the company has been certified before. Application types available are:

**Certification**—for a newly registered company. The Certification application has 16 pages total. As you progress through the applications, some questions will not be displayed if anything other than corporation is selected in the business structure question, some questions will be displayed if LLC is selected as the business structure, and the local unemployment compensation number question is not displayed for a sole proprietorship business structure. The program uses behind-the-scenes logic to display only those questions that apply, based on the answers to the business structure question.

**Recertification**—for an existing company that is within 90 days of its current expiration date and not more than 1 year past its expiration date. The Recertification application has nine pages.

**Upgrade**—for a currently certified company that has undergone some change that affects their certification classification. This could be a move to a new zone, adding additional categories or other items. The Upgrade has six pages.

**Joint Venture** is for companies that are collaborating with a CBE company for a while. The Joint Venture has one page.

The following example is for a company applying for a Certification. The number of pages for the application appears above the first question as a row of numbered boxes. The current page is shown as a white numbered box, completed pages are blue numbered boxes, and pages not yet completed are shown in grey boxes. The Certification application has 16 pages total.

Enter the application data by completing the steps below. To move between screens, use the **Previous** and **Save & Continue** buttons.

Application Data	Checklist	Tracking Details	Status
Step: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 <span style="color: red;">←</span> <span style="color: red;">Review checklist items</span> <span>Reset</span> <span>Save &amp; Continue &gt;&gt;</span>			
Fields marked with an asterisk (*) are required.			
Indicate the CBE status for which you are applying* (Choose all that apply. At least one must be selected)	<input checked="" type="checkbox"/> Local Business Enterprise (LBE) <input checked="" type="checkbox"/> Small Business Enterprise (SBE) <input type="checkbox"/> Disadvantaged Business Enterprise (DBE) <input type="checkbox"/> Development Enterprise Zone (DZE) <input checked="" type="checkbox"/> Longtime Resident Business (LRB) <input type="checkbox"/> Resident Owned Business (ROB)		
Business Structure*	<input checked="" type="radio"/> Corporation <input type="radio"/> Limited Liability Corporation <input type="radio"/> Partnership <input type="radio"/> Sole Proprietorship		
Business Identifier*	Federal Employer ID (FEIN) 521530696 Business Name: * Simon Development & Construction,		
Business Location Address*	Street Address 1: * 7600 GEORGIA AVENUE NW Street Address 2: 409 City: * WASHINGTON State: * District of Columbia Zip Code: * 20012 -		
Business Contact Information	Business Phone: * 202 .829 .3316 Business Fax: 202 .829 .0146 Business Email Address: test@dc.gov Business Website Address:		
Principal Contact*	First Name: * Simon Last Name: * Ezeibunam Title: * President Phone: * 202 .829 .3316 Email Address: * test@dc.gov		
Secondary Contact	First Name: Last Name: Title: Phone: - - Email Address:		

Figure 83: Add Application—Certification Application Selected

Certification is for a newly registered company. Some questions will not be displayed if anything other than corporation is selected in the business structure question, some questions will be displayed if LLC is selected as the business structure, and the local unemployment compensation number question is not displayed for a sole proprietorship business structure. The program uses behind-the-scenes logic to display only those questions that apply, based on the answers to the business structure question.

Enter information into the fields on the screen. Each application page has additional information available if you select the Help icon. Select “Save & Continue” to progress through the application.

When you enter a District “Business Location Address,” it will be verified against the MAR and if it does not quite match what is in the database, you will be asked if the address is the one you want. You may opt to accept the address as it was entered.

You can print out a Summary Report of all information on the application by selecting the Print icon. If any required fields are missing, you will not be able to continue entering data beyond that screen. Once all required information has been entered, select “Submit”. This changes the status for this application to “Application Submitted” on the Application List.

The following example is for a company applying for recertification. The number of pages for the application appears above the first question as a row of numbered boxes. The current page is shown as a white numbered box, completed pages are blue numbered boxes, and pages not yet completed are shown in grey boxes. The Recertification application has 9 pages total.


Application Data	Checklist	Tracking Details	Status
<b>Step:</b> 1 2 3 4 5 6 7 8 9  <span style="float: right;">Review checklist items</span> <span>Reset</span> <span>Save &amp; Continue &gt;&gt;</span>			
<small>Fields marked with an asterisk(*) are required.</small> Indicate the CBE status for which you are applying* (Choose all that apply. At least one must be selected) <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Local Business Enterprise (LBE)  <input checked="" type="checkbox"/> Disadvantaged Business Enterprise (DBE)  <input type="checkbox"/> Longtime Resident Business (LRB)               </div> <div> <input checked="" type="checkbox"/> Small Business Enterprise (SBE)  <input checked="" type="checkbox"/> Development Enterprise Zone (DZE)  <input type="checkbox"/> Resident Owned Business (ROB)               </div> </div>			
Business Structure*	<input type="radio"/> Corporation <input checked="" type="radio"/> Limited Liability Corporation <input type="radio"/> Partnership <input type="radio"/> Sole Proprietorship		
Business Identifier*	Federal Employer ID (FEIN) <input type="text" value="204062281"/> Business Name* <input type="text" value="B &amp; B Floor Services, LLC"/>		
Business Established*	Date Business Established* <input type="text" value="11"/> / <input type="text" value="18"/> / <input type="text" value="2005"/> <small>mm dd yyyy</small>		
Business Location Address*	Street Address 1:* <input type="text" value="3215 MARTIN LUTHER KING J"/> Street Address 2: <input type="text" value="B-101"/> City:* <input type="text" value="WASHINGTON"/> State:* <input type="text" value="District of Columbia"/> Zip Code:* <input type="text" value="20032"/> - <input type="text" value=""/>		
Business Contact Information	Business Phone:* <input type="text" value="202"/> <input type="text" value="562"/> <input type="text" value="0241"/> Business Fax: <input type="text" value="202"/> <input type="text" value="562"/> <input type="text" value="0242"/> Business Email Address: <input type="text" value="test@dc.gov"/> Business Website Address: <input type="text"/>		
Principal Contact*	First Name:* <input type="text" value="Corey"/> Last Name:* <input type="text" value="Bellamy"/> Title:* <input type="text" value="Owner"/> Phone:* <input type="text" value="202"/> <input type="text" value="562"/> <input type="text" value="0241"/> Email Address:* <input type="text" value="test@dc.gov"/>		
Secondary Contact	First Name: <input type="text" value="Lee"/> Last Name: <input type="text" value="Bellamy"/> Title: <input type="text" value="Owner"/> Phone: <input type="text" value="202"/> <input type="text" value="562"/> <input type="text" value="0241"/> Email Address: <input type="text" value="lbellamy@bbfloorservices."/>		

Figure 82: Add Application—Recertification Application Selected

Enter information into the fields on the screen. Each application page has additional information available if you select the Help icon. Select “Save & Continue” to progress through the application.

When you enter a District “Business Location Address,” it will be verified against the MAR and if it does not quite match what is in the database, you will be asked if the address is the one you want. You may opt to accept the address as it was entered.

You can print out a Summary Report of all information on the application by selecting the Print icon. If any required fields are missing, you will not be able to continue entering data beyond that screen. Once all required information has been entered, select “Submit”. This changes the status for this application to “Application Submitted” on the Application List.

The following example is for a company applying for an Upgrade. The number of pages for the application appears above the first question as a row of numbered boxes. The current page is shown as a white numbered box, completed pages are blue numbered boxes, and pages not yet completed are shown in grey boxes. The Upgrade application has 6 pages total.

Application Data Checklist Tracking Details Status

Step: 1 2 3 4 5 6 ← Review checklist items Reset Save & Continue >>

Fields marked with an asterisk (\*) are required.

Indicate the CBE status for which you are applying\* (Choose all that apply. At least one must be selected)

☒ Local Business Enterprise (LBE) ☒ Small Business Enterprise (SBE)  
☒ Disadvantaged Business Enterprise (DBE) ☒ Development Enterprise Zone (DZE)  
☐ Longtime Resident Business (LRB) ☒ Resident Owned Business (ROB)

Business Structure\* ☐ Corporation ☐ Limited Liability Corporation ☒ Partnership ☐ Sole Proprietorship

Business Identifier\* Federal Employer ID (FEIN) 203793753 Business Name\* TLCDEZ Enterprises

Business Location Address\* Street Address 1: 2019 NAYLOR ROAD SE Street Address 2:   
City: WASHINGTON State: District of Columbia Zip Code: 20020 -

Business Contact Information Business Phone: 202 610 1798 Business Fax: 202 610 1798  
Business Email Address: test@dc.gov Business Website Address: www.tlcdez.com

Principal Contact\* First Name: Tanya Last Name: Crawford  
Title: Vice President  
Phone: 202 610 1798 Email Address: test@dc.gov

Secondary Contact First Name: Last Name:   
Title:   
Phone: Email Address:

Back To Application List Review checklist items Reset Save & Continue >>

Figure 83: Add Application—Upgrade Application Selected

Enter information into the fields on the screen. Each application page has additional information available if you select the Help icon. Select “Save & Continue” to progress through the application.

When you enter a District “Business Location Address,” it will be verified against the MAR and if it does not quite match what is in the database, you will be asked if the address is the one you want. You may opt to accept the address as it was entered.

You can print out a Summary Report of all information on the application by selecting the Print icon. If any required fields are missing, you will not be able to continue entering data beyond that screen. Once all required information has been entered, select “Submit”. This changes the status for this application to “Application Submitted” on the Application List.

## 7.4 Joint Venture Application

Refer to Section 6.5

## 7.5 View/Print Company Information

Selecting the “View/Print Current CBE Information” button displays the following screen.

**Certification Administration**  
View/Print Company Information

Enter criteria below to search for a specific company by Company Name or FEIN. To print the current company information, select **Print** icon for a selected company in the table below.

Company Name:   
Company FEIN:

Showing: 1-10 of 1404 Page 1 of 141 [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [\[11+\]](#)

Company	Print	FEIN #
HMS Enterprises, Inc. Trading HMS Company		541767967
CII Title, LLC		043644179
Ohms Energy Company, LLC		050524945
ReStII Designers, Inc.		522126348
Caldwell Food Group, LLC		521871923
Powell's Manufacturing Industries, Inc.		521429660
V & W Construction and Electrical Co.		522359529
Health Right, Inc.		522011721
ComputerData Solutions, LLC (formerly Computer Data Supplies, LLC)		522155396
Future Care, LLC		522324331

Figure 84: View/Print Company Information – Search Screen

Enter a CBE's company name or FEIN into one of the fields. If you want to use the search feature, enter the first few letters of a company's name in the “CBE Company Name” field and select the “Search” button. The results will be displayed in a pop-up list and you can select a name from the list.

Once you have a valid CBE Company Name or FEIN, select the “Print” icon in the table to display the report. The following figure is a sample of the Company Information Report.

Use the Print link on the screen to print out a copy of the report. Use the print dialog box to adjust the layout (landscape or portrait) if you desire. Use the “Go Back” link to return to the previous page.

(this control box will not be printed)  
[print window](#)   [close window](#)

**COMPANY INFORMATION REPORT**  
**HMS ENTERPRISES, INC. TRADING HMS COMPANY**

**General Application and Business Information**

Date of Summary:	Thursday, July 12, 2007
Business Name:	HMS Enterprises, Inc. Trading HMS Company
FEIN:	541767967
LSDBE Number:	
Expiration Date:	01/01/1900 <b>Expired</b> ←
Provisional LSDBE Number:	T_LSDR4887102007
Provisional Expiration Date:	10/04/2007
Certification Categories:	DBE, LBE, ROB, SBE
Business Structure:	Corporation
Date Business Established:	10/11/1995
Dun & Bradstreet No:	024022407
Local Unemployment Compensation No:	120866

**Business Location Address**

Address 1:	316 F STREET NE
Address 2:	115
City:	WASHINGTON
State:	DC
Zip Code:	20002

**Mailing Address**

Street Address 1:	600 Maryland Avenue SW
Street Address 2:	450
City:	Washington
State:	DC
Zip Code:	20024

**Small and Disadvantaged Business Data** (based on location address)

Ward:	6
ANC:	ANC 6C
Enterprise Zone:	
Development Enterprise Zone:	
Business Phone:	(202) 547-2037
Business Fax:	(202) 547-2038
Business Email:	test@dc.gov
Business Website:	www.hms-world.com

**Public Contact**

Public Contact:	Brian Hall
Contact Phone:	(202) 547-2037
Contact Email:	test@dc.gov

**Work Categories**

General Service (\$19M) | Communications  
 General Service (\$19M) | Computer Related Services | Facilities Management  
 General Service (\$19M) | Computer Related Services | Information Management/Retrieval  
 General Service (\$19M) | Information Technology  
 General Service (\$19M) | Repair/Maintenance Services  
 General Service (\$19M) | Telecommunications  
 Professional Service | Business Service (\$10M)  
 Professional Service | Business Service (\$10M) | Management Services (General)

**Business Activity Percentage**

Type	Percentage of diversity
Service Provider	100 %

**Company Owners Information**

<b>Principal Owner</b>	Brian Hall	Name	Charles Hall
Home Address:	608 G Street SW	Home Address:	5818 Cannon Lane
	Washington DC 20024		Alexandria VA 22303
Phone:	(202) 547-2037	Phone:	(703) 960-1024
Race:		Race:	
Citizen:	Yes	Citizen:	Yes
Place of Birth:		Place of Birth:	
Proof of Citizenship:		Proof of Citizenship:	
# Shares:	51.00	# Shares:	49.00
% Ownership:	51.00	% Ownership:	49.00
Initial Capital Injection:	\$0.00	Initial Capital Injection:	
Class of Stock:	0	Class of Stock:	

Figure 85: Company Information Report

## 7.6 Update Company Information

Selecting the Update Company Information displays the same Search Screen as described in 6.9 above for the Certification Manager. Certification Specialist will see the following screen upon selecting the “Update” link in the table.

**Certification Administration**  
**Update Company Information - Kalos Construction Company, Inc.**  
 Update information for a company below. To save changes, select **Save Changes**. To return to the list of all companies, select **Back to Company List**.

Print ? Help Log Out Certification Manager

Business Info Location/Contacts Services/NIGP Codes Owners Board of Directors Officers Notes

Fields marked with an asterisk (\*) are required.

Business Name: Kalos Construction Company, Inc.

Certification Category\* (Choose all that apply):  
☒ Local Business Enterprise (LBE) ☒ Small Business Enterprise (SBE)  
☐ Disadvantaged Business Enterprise (DBE) ☐ Development Enterprise Zone (DZE)  
☐ Longtime Resident Business (LRB) ☐ Resident Owned Business (ROB)

Current CBE Number: LS00440032009 Expiration Date: 3/1/2009 ☐ Terminate

Business Structure\*: ☒ Corporation ☐ Limited Liability Corporation ☐ Partnership ☐ Sole Proprietorship


Business Established\*: Date Business Established: 10/01/1985 Location of Incorporation:

Other Business Identifiers\*:  
 Dun & Bradstreet No.\*: Contact (800) 333-0505 for assistance  
 Local Unemployment Compensation No.\*: Contact (202) 698-7550 for assistance

Describe the business primary line, trade, or service.\* (1000 characters maximum)

Back To Company List Reset Save Changes

Figure 86: Update Company Information – Business Info tab

1. The name of the company that you selected is shown at the top of the page.
2. You may update company information by selecting one of the available tabs: Business Info, Location/Contacts, Services/NIGP Codes, Owners, Board of Directors, Officers and Notes.
3. Fields that are read-only for the Certification Specialist are grayed out on the screen.
4. You may view the history of changes for any field by selecting the History icon  next to the field name.
5. If you have made changes or added information, be sure to select the “Save Changes” button before leaving the page. Select “Reset” to reverse all the changes.
6. Changes made via the Update Company Information function will not update information in any of the applications submitted by the company.
7. Select “back To Company List” to return to the Search Screen.

## 7.7 Generate Reports

Refer to Section 6.6

## 7.8 Create Mail Merge Data File

Refer to Section 6.10

## 8 DSLBD View Only User

DSLBD View Only user has read-only access to most of the functions that are available for the Certification Manager and Certification Specialist.

### 8.1 DSLBD View Only Main Menu

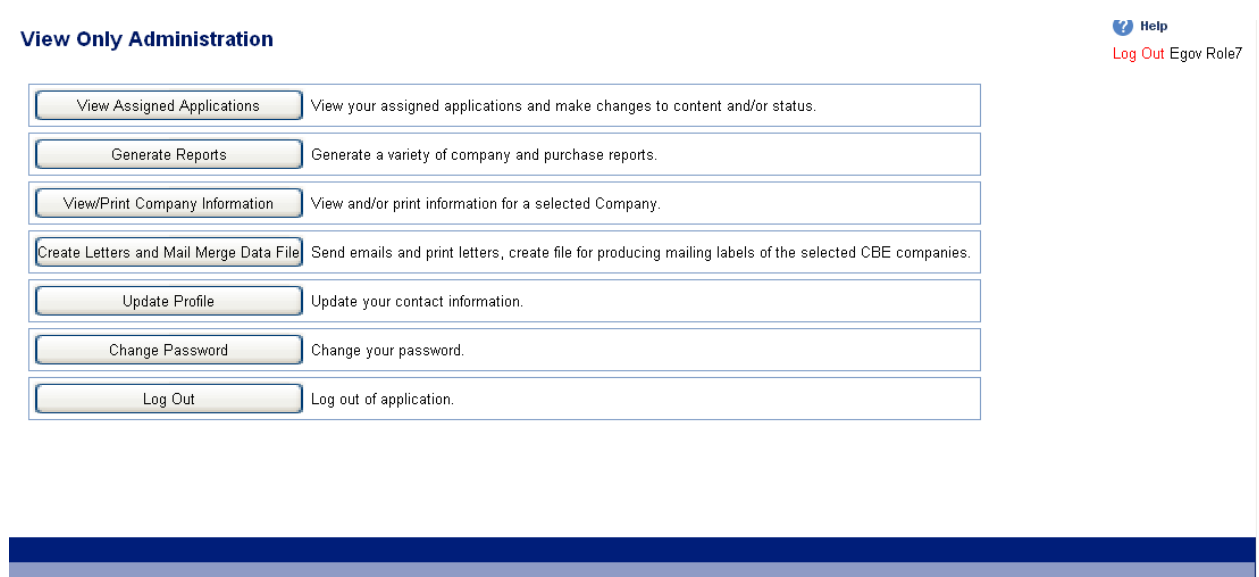


Figure 87: DSLBD View Only Main Menu Screen

### 8.2 View Existing Applications

View Existing Applications for the DSLBD View Only user displays the same search screen as described in section 7.2 for the Certification Manager and Certification Specialist. Upon selecting the “Details” link on the search screen, Application Data will display only step 1 of the selected application. DSLBD View Only user cannot make changes to the information in the application. Similarly, Status and Checklist tabs will display information in read-only format.



Application Data		Checklist	Status
		Review checklist items <a href="#">Reset</a>	
Fields marked with an asterisk (*) are required.			
Indicate the CBE status for which you are applying* (Choose all that apply. At least one must be selected)		<input checked="" type="checkbox"/> Local Business Enterprise (LBE) <input checked="" type="checkbox"/> Small Business Enterprise (SBE) <input checked="" type="checkbox"/> Disadvantaged Business Enterprise (DBE) <input checked="" type="checkbox"/> Development Enterprise Zone (DZE) <input type="checkbox"/> Longtime Resident Business (LRB) <input type="checkbox"/> Resident Owned Business (ROB)	
Business Structure*	<input checked="" type="radio"/> Corporation <input type="radio"/> Limited Liability Corporation <input type="radio"/> Partnership <input type="radio"/> Sole Proprietorship		
Business Identifier*	Federal Employer ID (FEIN) <input type="text" value="743061728"/> Business Name:* <input type="text" value="Designed Services, Inc."/>		
Business Location Address*	Street Address 1:* <input type="text" value="3215 MARTIN LUTHER KING J"/> Street Address 2: <input type="text"/>		
	City:* <input type="text" value="WASHINGTON"/> State:* <input type="text" value="District of Columbia"/> Zip Code:* <input type="text" value="20032"/> - <input type="text"/>		
Business Contact Information	Business Phone:* <input type="text" value="202"/> <input type="text" value="561"/> <input type="text" value="3700"/> Business Fax: <input type="text" value="202"/> <input type="text" value="563"/> <input type="text" value="3589"/>		
	Business Email Address: <input type="text" value="test@dc.gov"/> Business Website Address: <input type="text" value="www.designedservices.net"/>		
Principal Contact*	First Name:* <input type="text" value="Monica"/>		Last Name:* <input type="text" value="Ray"/>
	Title:* <input type="text" value="President"/>		
	Phone:* <input type="text" value="202"/> <input type="text" value="561"/> <input type="text" value="3700"/>		Email Address:* <input type="text" value="test@dc.gov"/>
Secondary Contact	First Name: <input type="text"/>		Last Name: <input type="text"/>
	Title: <input type="text"/>		
	Phone: <input type="text"/> <input type="text"/> <input type="text"/>		Email Address: <input type="text"/>
<a href="#">Back To Application List</a>		Review checklist items <a href="#">Reset</a>	

Figure 88: DSLBD View Only Application Details Screen

### 8.3 Generate Reports

Refer to section 6.6.

### 8.4 View/Print Company Information

Refer to section 7.5

### 8.5 Create Mail Merge Data File

Refer to section 6.10.

## 9 Agency CBE Liaison

**Agency Liaison Administration** [Help](#)  
[Log Out](#) Liaison Agency

<a href="#">Generate Compliance Report</a>	Monitor your agency's spending against its LSDBE goal and print report.
<a href="#">Update Profile</a>	Update your contact information.
<a href="#">Change Password</a>	Change your password.
<a href="#">Log Out</a>	Log out of application.

Figure 89: Agency Liaison Administration Screen

### 9.1 Generate Compliance Report

Selecting “Generate Compliance Report” for the first time in a fiscal year displays the following screen.

**Agency Compliance** [Print](#) [Help](#)  
[View Agency Compliance](#) [Log Out](#) Liaison Agency

Use the information below to monitor your agency's spending against your LSDBE spending goals. A spending summary along with the detailed listing of purchase orders that went to LSDBEs are listed below.

Alcoholic Beverage Regulation Administration	
Expendable Budget: <input type="text" value="0.00"/>	Annual LSDBE Goal: <input type="text" value="0.00"/>
Fiscal Year: 2006	Percentage of Expendable Budget: n/a
Purchase Orders to Date: \$0.00	Percentage of Goal: n/a

[Save](#)

There is no purchase order data for the selected agency.

Figure 90: View/Print Agency Compliance Report—Enter Goals

Enter your Agency's yearly goals. You will be allowed to enter this only once and cannot change it. If changes need to be made, you must contract the Compliance Manager who has the capability of adjusting the values for you. You will need to provide written authorization to DSLDB in order to have a change made.

If you select “Generate Compliance Report” after your goals have been entered, the following screen is what you will see.

Fiscal Year: 2006

Purchase Orders to Date: \$157,014.41

Percentage of Expendable Budget: 90%

Percentage of Goal: 87.23%

Showing: 1 - 10 of 49

Page 1 of 5 1 2 3 4

FEIN	Vendor Name	PO Number	PO Amount	PO Date	Description
1030439371	P & P OFFICE & FURNITURE SUP	PO104520	\$0.99	11/28/2005	General Services
1030439371	P & P OFFICE & FURNITURE SUP	PO104528	\$0.99	11/29/2005	General Services
1030439371	P & P OFFICE & FURNITURE SUP	PO104541	\$96.40	11/29/2005	General Services
1300072705	LIFE INFINITE LLC	PO102088	\$8,000.00	11/21/2005	General Services
1300072705	LIFE INFINITE LLC	PO102089	\$80,000.00	11/21/2005	General Services
1300072705	LIFE INFINITE LLC	PO104497-V3	\$25,149.00	11/23/2005	Technology
1300072705	LIFE INFINITE LLC	PO104519-V2	\$100.00	11/30/2005	General Services
1300072705	LIFE INFINITE LLC	PO104521	\$100.00	11/28/2005	General Services
1300072705	LIFE INFINITE LLC	PO104527-V2	\$100.00	11/29/2005	Transportatn/Specialty Equip
1300072705	LIFE INFINITE LLC	PO104574	\$2,500.00	12/06/2005	General Services

*Figure 91: View/Print Compliance Report – Read or Print only*

All P.O. data in the table comes from PASS and is automatically updated ever 24 hours. Select



the Print icon **Print** to print a copy of the report.

## Appendix A: Acronyms, Abbreviation, and Definitions

Term	Definition
ANC	Advisory Neighborhood Commission
CAD	Contract Activity Database
CADS	Contracting Activity Database System
DBE	Disadvantaged Business Enterprise
DSLBD	Department of Small and Local Business Development
DZE	Development Enterprise Zone
FEIN	Federal Employee Identification Number
LBE	Local Business Enterprise
LRB	Longtime Resident Business
CBE	Certified Business Enterprise
MAR	Master Address Repository
NIGP	National Institute of Government Purchases
OCP	Office of Contracting and Procurement
OCTO	Office of the Chief Technology Officer
PASS	Automated Purchasing System
ROB	Resident Owned Business
RSD	Requirements Specification Document
SBE	Small Business Enterprise